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ABSTRACT

This technical assistance guide is intended to aid teachers and trainers in Job Training Partnership Act Service Delivery Area (SDA) summer programs that are components of work force skill development programs for youths. It is aimed especially at SDAs that either are experiencing or anticipating resistance to change from their organizations, worksites, or education agencies. The guide provides insight into and practical guidance on the change process and capacity-building in the context of summer enrichment programs. The first of six chapters provides a basic understanding of change agency, or the process for orchestrating organizational change by establishing a community work group, evaluating the climate for change, and facilitating support and consensus among community partners. Chapter 2 helps the change agent market and promote summer enrichment through basic marketing techniques. Chapters 3 and 4 address capacity-building in order that employers and schools can implement the changes represented by enriched summer programs incorporating integrated work and learning, active learning, competency-based instruction, and skills identified by the Secretary's Commission on Achieving Necessary Skills. Chapter 5 considers program models that allow SDAs to implement enriched summer programs when support from worksites or schools is limited. The final chapter helps readers devise a means for collecting data that can be used to convince community partners of the value of a summer enrichment program. An appendix provides a handbook of interactive skills for change agents. Topics covered by the handbook include the following: "do's" and "don'ts" for effective change agents, basic communication skills, nonverbal communication, giving and receiving feedback, conducting effective briefings, running effective meetings, and facilitating focus groups. (KC)

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JTPA Summer Youth Enrichment: A Change Agent Guide

A Technical Assistance and Training Series

U.S. Department of Labor
Employment and Training Administration
1994

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Change Agent Guide

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The Authors

Introduction

In 1992, the Department of Labor (DOL) began a campaign to encourage and support the enrichment of summer programs for youth. DOL identified such programs as key elements in providing minimum skills needed by the national workforce. With the help of many technical assistance projects that support States and service delivery areas (SDAs), DOL now estimates that about 30 percent of youth served by summer programs funded under the Job Training Partnership Act, Title II-B, participate in enriched summer programs. These programs integrate work and learning to boost participants' basic academic foundation skills and to teach them higher level skills. The acquisition of such skills ensures participants' success in the workplace and promotes good citizenship.

A continuing theme running through the advice, technical assistance materials, and training designed to help States and SDAs implement summer enrichment programs is the need for change—change in how SDAs, local education agencies (LEAs), and worksites view youth employment and training programs and their role in preparing youth for today's labor market.

Much of the change relates to the work of the Labor Secretary's Commission on Achieving Necessary Skills (SCANS), which defines knowledge and skills needed for entry into a competitive, modern American workforce. Youth, especially disadvantaged youth, require learning opportunities attuned to the standards implied by SCANS findings.

DOL encourages SDAs to combine forces with worksites and schools to implement summer programs that incorporate progressive learning techniques (e.g., contextual, active learning that reflects SCANS competencies and foundation skills). SDAs are expected to organize summer programs that integrate work and learning by coordinating the resources of voluntary worksites (nonprofit and public agencies) with the resources of local schools.

This assumes the following three things: (1) SDAS are prepared for their roles as leaders and agents of change, (2) employers are willing to make the necessary changes in their supervisory methods to accommodate the new approach to work and learning, and (3) schools are willing to make the necessary changes in their teaching methods to accommodate the new approach to work and learning. The degree of change needed in all three instances is deep and wide. Traditional teaching of reading, math, and language skills, directing work activities, and even assessing and evaluating students and workers must change. These changes will, in turn, affect work and school scheduling, staff recruitment and training, and a myriad of procedures and forms. In some cases, SDAs and their schools and worksites have made the changes. In many cases, they have not.

This technical assistance guide, the *Change Agent Guide,* is written for SDAs that either are experiencing or anticipating resistance to change from their organizations, worksites, and/or LEAs. The guide provides some insight into and practical, explicit guidance on the change process and capacity-building in the context of summer enrichment programs. It allows SDAs to take advantage of the Field Kit for Communities Committed to Improving Academic Enrichment in Summer Youth Employment Programs, developed by Brandeis University, even if their communities are not fully committed. In this sense, the *Change Agent Guide* complements information in the Brandeis Field Kit.

Chapter 1, "Serving as a Change Agent," of the *Change Agent Guide* provides a basic understanding of change agentry, or the process for orchestrating organizational change. The chapter provides a structure for establishing a community work group, evaluating the climate for change, and facilitating support and consensus among community partners. In addition, the chapter contains an appendix on interactive skills and techniques for the change agent.

The principles and techniques in Chapter 1 are equally applicable to a wide range of interagency coordination agendas, not just to summer enrichment. For readers who have summer enrichment programs well in hand, but have other coordination challenges, this chapter will suggest methods that can resolve such issues.

Chapter 2, "Marketing Work and Learning," helps the change agent market and promote summer enrichment. The chapter relates basic marketing concepts to the task of convincing various community partners to "buy-in" to the integrated work and learning approach for enriching summer programs for youth. In particular, it offers arguments in support of this approach that will appeal to employers, LEAs, and private industry councils. It also provides some tips for developing a marketing plan and building a coalition.

Chapters 3 and 4 address capacity-building, which is needed if employers and schools are to implement the changes represented by enriched summer programs that incorporate integrated work and learning, active learning, competency-based instruction, and SCANS skills.

Chapter 3, "Changing Worksites to Support Contextual Learning Strategies," discusses how the change agent can approach worksites on the subject of capacity-building. In particular, the chapter looks at methods for identifying SCANS competencies and foundation skills in typical summer jobs, preparing curricula for a work-based learning strategy, and the concepts behind competency-based instruction.

Chapter 4, "Converting Traditional Classrooms Into Contextual Learning Laboratories," suggests ways in which change agents can help teachers learn the techniques for managing a classroom-based, integrated work and learning strategy. The chapter looks at how teachers develop partnerships with worksites, teach SCANS skills in a contextual learning setting, and help young learners transfer what they have learned in one setting to another setting.

Chapter 5, "Applying Program Models for Summer Enrichment," considers program models that allow SDAs to implement enriched summer programs when support from worksites and/or schools is limited. The chapter shows how the degree of commitment from schools and worksites affect program design. It then offers five models that exemplify the three enrichment strategies described in the Brandeis Field Kit. Each model demonstrates how limited commitment from worksites and/or schools affects cost, staff qualifications, and other practical considerations.

The last chapter, Chapter 6, "Computing the Bottom Line," helps readers devise a means for collecting data that can be used to convince community partners of the value of a summer enrichment program. The chapter includes a chart that correlates measurement of summer program outcomes with the agendas and interests of schools, worksites, and the general public. This closes the loop on the change process by using current summer enrichment programs to promote more commitment and a better climate for organizational change for next year.

The *Change Agent Guide* is not an exhaustive treatment of any of these topics. Instead, it is intended to focus on getting your partners to make changes in their attitudes and organizations to support a new kind of summer program.

Chapter 1

Serving as a Change Agent

Chapter 1
Serving as a Change Agent

Introduction

This chapter provides some general guidance on serving as an agent of change. This information is presented first because techniques and skills discussed here are the cornerstone of the strategies described in later chapters.

Guiding you through the process of orchestrating change, either in your own service delivery areas (SDAs) or other SDAs in your State, calls for methods that address both the rational objections to enriching summer programs and the less rational, but nevertheless powerful, psychological factors that may lead potential partners to withhold their support. Therefore, in addition to outlining procedures to help you organize and focus the changes needed at worksites, schools, and SDAs to facilitate integrated work and learning for purposes of academic enrichment, we will provide tips for disarming the psychological resistance that also can be a barrier to change.

We begin by defining "change agent." We then discuss what must happen for change to occur. We then provide you with procedures for organizing your approach to effecting change so that you can plan a strategy suitable for your objectives and circumstances. The last section of this chapter is the all-important discussion of techniques for understanding and overcoming resistance to change when its basis is rooted in unspoken and irrational fears.

Each time you bring together organizations for the purpose of better interagency coordination, you are serving as a change agent. This is likely to be one of your most challenging roles. The information contained in this chapter is designed to help you meet this challenge without having to pursue a postgraduate degree in psychology. To do so, we have condensed many behavioral theories and practices into guidelines that deal with issues related to the task at hand—bringing about new teaching methods, worksite supervision, and staff/participant relationships that support academic enrichment for Job Training Partnership Act (JTPA) summer youth programs. You can also view the process and principles included here as being equally applicable to all your coordination efforts.

What Is a Change Agent?

Simply stated, which is always the best way to state things, a change agent is someone who leads, organizes, and facilitates changes in an organization. Notice that we didn't say that the change agent is responsible for making change happen. The people in the organization are responsible for making change happen.

This distinction is critical if you are to be a successful change agent for summer enrichment programs. Change agents must work through others to be effective. Their work typically involves:

- Creating a good climate for change: This entails identifying and reducing barriers to change, building communication and trust among collaborators, and helping people overcome their fear of change.

- Synthesizing information: Change agents must assemble relevant information and present it so that people within the organization are well informed and can make good decisions about problems and solutions. In some cases, this requires researching written sources, organizing fact-finding missions, or bringing in outside expertise.

- Building collaboration: Change agents facilitate relationships that allow people to contribute the elements needed for change to occur. These elements may take the form of ideas for solving problems, material resources (e.g., money or space), human resources (e.g., teachers or worksite supervisors), moral support, and political influence.

How Doos Change Occur?

Change occurs when the following three elements are in place:

- People in the organization agree on the nature of the problem or the need for change.

- People in the organization agree on the approach that will address the problem and meet the identified need for change.

- People associated with the organization make their contributions to implement the approach.

As you can see, people in or associated with the organization are the cornerstone to change. It is a good idea to think of these elements as interim objectives that lead to the accomplishment of the change.

How Do I Do It?

Doing it is a matter of applying change agent skills—creating a climate for change, using information, and building collaboration—to achieve the three essential elements for change: agreement on the problem, agreement on the solution, and team effort to implement the solution.

A straightforward strategy for accomplishing change involves a work group comprising representatives from organizations that will be involved in your summer program. At minimum, the group should include the SDA, representatives from schools attended by participants and from schools that provide academic programs for summer participants, and major worksites.

Each of these organizations represent resources needed for an integrated work/learning approach, which is the basis for summer enrichment. Organizations will probably have to change from their traditional methods of worksite supervision and classroom instruction to methods that reflect the concept of functional context instruction. These changes will inevitably require energy, time, and other resource investments by the organizations.

As a change agent with a summer enrichment mission, your job will be to enable these organizations and key community partners to make the requisite changes in their procedures, practices, and attitudes. The work group members are your access to their respective organizations, where the change process will be rooted. So let's talk a bit about the work group, which will be the center of the change process.

Change agentry, as a rule, is a matter of changing the organization in which you are a member—in your case, the administrative entity for the Title IIB program financed through the JTPA. The summer program, by its nature, depends also on the cooperation and substantive involvement of at least two other types of organizations: worksites, of which there may be 20 to 100, and local education agencies (LEAs) that either provide educational services for summer program participants or are the primary educators of the participants the rest of the year.

In this case, you, the change agent, may not be a member of the organization that must change. However, by establishing a work group consisting of representatives of these other organizations, you can apply the change agentry process to the group members, thereby turning each one into an extension of you as the change agent.

The effectiveness of this approach depends on the influence of work group members on their respective organizations and how well you model the behavior and skills associated with a good change agent. In setting up the work group, strive for members who are respected leaders in their organizations and are able and willing to work. If you are assisting another SDA with this process, pass on this advice and help it select its work group members.

One method of increasing the probability that work group members will be effective change agents within their own organizations is to do some research to identify organization members who share your interest in and commitment to youth programs. Even if such staff are not highly placed in the organization, they are valuable resources for generating similar interest at higher levels of management.

Another valuable resource for recruiting work group members are organization staff who are currently engaged or leading organization change for other purposes. These staff are generally highly placed within the organization and may view your objectives as compatible with their own.

When one of the organizations that you would like represented on the work group is not ready for change or exhibits a poor climate for change, try to proceed without its involvement. An organization committed to the status quo is unlikely to respond to these initial efforts and may

undermine progress of the work group. When the summer enrichment process gains momentum, you can then try to bring in reluctant organizations.

Now, let's look at the steps in the process that will help you initiate organizational change through the work group.

Step 1: Assess the Organizations' Readiness for Change

Your strategy as a change agent must be based on an understanding of the organizations with which you will be working. These organizations will vary in their readiness for change and their barriers to change. Ask for organizational charts and information that help you visualize the people in the organization and their functions, titles, and lines of communication and authority.

With the help of the work group, assess each organization's readiness for change by using the self-assessment questionnaire presented as Exhibit 1. This instrument was taken from an article in the February 1994 issue of *Fortune* magazine and modified to be more relevant to JTPA programs.

Rate each item on a scale of 1 to 3, with 3 presenting the best score. The higher the composite score (51 is the maximum score possible), the easier the organization can change. Items that score 1 or 2 represent areas that should be improved.

Exhibit 1-1

Self-Assessment Questionnaire

MANAGING CHANGE: ARE YOU READY?

The left column lists 17 key elements of readiness for change. Rate your organization on each item. Give three points for a high ranking ("We're good at this; I'm confident of our skills here."); two for medium ranking ("We're spotty here; we could use improvement or more experience."); and one point for low ranking ("We've had problems with this; this is new to our organization.") Be honest. Don't trust only your own perspective; ask others in the organization at all levels to rate the company, too.

Readiness Scoring:

High = 3
Medium = 2
Low = 1

CATEGORY: **SCORE:**

SPONSORSHIP

The sponsor of change is not necessarily its day-to-day leader; he/she is the visionary, chief cheerleader, and bill payer—the person with the power to help the team change when it meets resistance. Give three points if sponsorship comes at a senior level; for example, CEO, COO, or the head of an autonomous business unit. Give two points if the sponsor is a mid-level executive or staff officer. Give one point if the sponsor is from the line staff.

LEADERSHIP

This means the day-to-day leadership—the people who call the meetings, set the goals, and work until midnight. Successful change is more likely if leadership is high level, has "ownership" (that is, direct responsibility for what's to be changed), and has clear program or business results in mind. Low-level leadership that is not well connected throughout the organization (across departments) or that comes from the line staff is less likely to succeed and should be scored low.

MOTIVATION

Give high points for a strong sense of urgency from senior management that is shared by the rest of the organization and for an organizational culture that emphasizes continuous improvement. Give low points for tradition-bound managers and workers, many of whom have been in their jobs for more than 15 years; a conservative culture that discourages risk taking.

CATEGORY: **SCORE:**

DIRECTION

Does senior management strongly believe that the future should look different from the present? How clear is management's picture of the future? Can management mobilize all relevant parties—employees, the board, customers, etc.—for action? Give high points for positive answers to those questions. If senior management thinks only minor change is needed, the likely outcome is no change at all; score yourself low.

MEASUREMENTS

Give yourself three points if you already use performance measures encouraged by total quality management (high positive outcomes, client/customer satisfaction, etc.) and if these express the goals of the organization. Give yourself two points if some measures exist but compensation and reward systems do not explicitly reinforce them. If you don't have measures in place or don't know what we're talking about, give yourself one point.

ORGANIZATIONAL CONTEXT

How does the change effort connect to other major goings-on in the organization? For example, does it dovetail with a continuing total quality management process? Does it fit with strategic actions such as new programs for potential dropouts or new services? Trouble lies ahead for a change effort that is isolated or if there are multiple change efforts whose relationships are not linked strategically.

PROCESSES/FUNCTIONS

Major changes almost invariably require redesigning administrative processes that cut across functions such as enrollment, staff training, and record keeping. If functional executives are rigidly turf conscious, change will be difficult. Give yourself more points the more willing executives and the organization as a whole are to change critical processes and sacrifice perks or power for the good of the group.

COMPETITOR BENCHMARKING

Whether you are a leader in your field or a laggard, give yourself points for a continuing program that objectively compares your organization's performance with that of similar groups. Give yourself one point if knowledge of other organizations' performance is primarily anecdotal—for instance, what PIC directors say at conferences.

CATEGORY: **SCORE:**

CLIENT FOCUS

The more everyone in the company is imbued with knowledge of clients, the more likely the organization can agree to change to serve them better. Give yourself three points if everyone in the workforce knows who his/her clients are, knows their needs, and has had direct contact with them. Take away points if that knowledge is confined to pockets of the organization (intake staff and case managers).

REWARDS

Change is easier if managers and employees are rewarded for taking risks, being innovative, and looking for new solutions. Team-based rewards are better than rewards based solely on individual achievement. Reduce points if your organization, like most, rewards continuity over change. If managers become heroes for making budget, they won't take risks even if you want them to. In addition, if employees believe failure will be punished, reduce points.

ORGANIZATIONAL STRUCTURE

The best situation is a flexible organization with little churn—that is, reorganizations are rare, but well received. Score yourself lower if you have a rigid structure that has been unchanged for more than 5 years or has undergone frequent reorganization with little success; that may signal a cynical organizational culture that fights change by waiting it out.

COMMUNICATION

An organization will adapt to change most readily if it has many means of two-way communication that reach all levels of the organization and that all employees use and understand. If communications media are few, often unread, and almost exclusively one-way and top-down, change will be more difficult.

ORGANIZATIONAL HIERARCHY

The fewer levels of hierarchy and employee grade levels, the more likely an effort to change will succeed. A thick layer of middle management not only slows decision making but also creates large numbers of people with the power to block change.

CATEGORY: **SCORE:**

PREVIOUS EXPERIENCE WITH CHANGE

Score three if the organization has successfully implemented major changes in the recent past. Score one if there is no previous experience with major change or if change efforts failed or left a legacy of anger or resentment. Most organizations will score two, acknowledging equivocal success in previous attempts to change.

MORALE

Change is easier if employees enjoy working in the organization and the level of individual responsibility is high. Signs of unreadiness to change include low team spirit, little voluntary extra effort, and mistrust. Look for two types of mistrust: mistrust between management and employees and mistrust among departments.

INNOVATION

The ideal situation is when the company is always experimenting, new ideas are implemented with seemingly little effort, and employees work across internal boundaries without much trouble. Bad signs include lots of red tape, multiple sign-offs before new ideas are tried, and the fact that employees must go through channels and are discouraged from working with colleagues from other departments or divisions.

DECISION MAKING

Rate yourself high if decisions are made quickly, taking into account a wide variety of suggestions, and it is clear where decisions are made. Give yourself a low grade if decisions come slowly and are made by a mysterious "them," there is a lot of conflict during the process, and there is confusion and finger-pointing after decisions are announced.

Adapted from *Fortune*, February 1994.

The 17 dimensions being assessed describe the climate for change; however, only 7 of these are areas that you and your work group might be able to influence. Tips for improving the climate for change in these areas follow.

- Sponsorship: Sponsorship refers to the person or office that endorses the change and thereby gives it the organization's official sanction. States have a mandate to bring about coordination among relevant agencies serving youth. You can appeal to the State for assistance in getting the attention and support of top-level managers of State-affiliated organizations. Organizations that are locally controlled should be influenced by interventions from the Private Industry Council (PIC). Overall, the PIC is the appropriate body to lead a marketing effort to publicize and promote summer enrichment strategies. (See Planning Step 2 of the Brandeis Field Kit for marketing tips.)

  One method that might gain the support of potential worksites is a roundtable of summer program employment advisors comprising worksite managers and other employees and led by the PIC. This could be a luncheon or dinner meeting with presentations designed to promote the need for and concepts behind summer enrichment.

  Do not expect that an elevation in sponsorship will necessarily change the organization's representative on your work group. It is more important that the organizations represented in your work group have the endorsement of their top-level managers and policy makers than it is for them to actually attend meetings.

- Leadership: Leadership refers to the personnel who lead the organization's change effort and actually perform the work. Elevating the level of sponsorship will automatically improve the level of leadership even if there are no changes in the roles or identity of the leaders, because the leaders are more connected with the power centers of their organizations. (Each member of the work group is the leader for his/her organization in this context.) Further improvements in the level of leadership occurs when work group members are assisted or replaced by higher level and more influential personnel in their organization. Be wary of top-level work group members who cannot give the time and attention to the work of the group. They become perfunctory members who make little or no contribution other than lending their names.

- Motivation: The change agent can improve the organization's motivation by educating decision makers about the value of enriching summer programs. A number of strong arguments for this are provided in the Field Kit. In addition, change agents can make sure that supporting organizations are recognized for their contributions. Once again, the State can be a strong motivator for State-affiliated agencies, using coordination criteria to instill concern for the quality of summer programs.

- Organizational context: If you understand the organizational context, and sometimes only upper management does, it is useful to identify areas that are enhanced by or compatible with the summer enrichment strategy and adjust the

strategy to bring about a close fit. If you are in a position to alter the organizational context, you can expand or tailor ongoing organizational change to accommodate the summer enrichment strategy. Compatibility between goals and processes protects the summer enrichment strategy from losing resources to competing organizational goals.

- Processes/functions: The change agent can offset any required changes in organizational processes and functions by designing forms, procedures, and processes that are compatible with the organization's usual processes and functions. This may require cross-referencing information from one form to another for management information system purposes, revising definitions, or cross-training staff.

- Client focus: Even organizations whose clients are youth may need help identifying the needs of youth. The Field Kit provides some excellent material for educating organizations about the issues surrounding developmental factors that affect the learning potential of adolescents. The change agent may be helpful in supplying and presenting information on the general topic "Serving Youth As Youth."

- Rewards: Change agents are in a good position to reinforce change though the use of rewards such as praise and public recognition for the work group and the organizations that they represent. In cases where risk taking and innovation is inhibited by State or Federal policies, the change agent may facilitate alternative policies by bringing problems to the attention of the proper authorities.

The self-assessment questionnaire will help you and your work group identify areas that may need improvement—those dimensions scoring 1 or 2. To the extent that you can bring about these improvements, you will have created a better climate for change and increased your chances for successfully launching a summer enrichment strategy.

Step 2: Getting Agreement on Nature of Problem and Need for Change[1]

It is important to begin the change process with agreement on the nature of the problem and the need for change. Once again, use the work group to gain access to the organizations and obtain agreement across organizations through the work group.

Agreeing on the nature of the problem implies some ownership of the problem. The change agent's role in this process is to research and synthesize information for the work group, facilitate and clarify communications within the group, keep discussions focused, and help work group members resolve different viewpoints. The objective is to obtain consensus on, not solutions to, the problem—participants' academic progress that prepares them for the realities of a new labor market. Solutions will come later.

[1] We wish to acknowledge the contributions of the Florida State University Department of Education's Division of Curriculum and Instruction training program, "Change Agentry for Educational Change," 1976.

A good way to get started is to present your understanding of the problem (e.g., retaining and/or gaining basic skills during the summer school break) and ask work group members to describe the nature of the problem from their viewpoints as teachers, worksite supervisors, etc. Record their thoughts on flip charts. You will probably hear things such as "Teenagers hate basic math." "They get bored easily." "They don't understand the importance of academic skills." "Schools don't teach anymore. They just try to keep order." The resulting remarks describe the present undesirable situation.

When group members have exhausted their descriptions of the present, ask them to describe the desired situation, which you will also record on flip charts. You will probably get comments such as "Students will show enthusiasm for their school work." "Students will develop a genuine interest in what is going on in the classroom." "Students will do well on basic skills tests."

Now you have two lists: one describing the present undesirable situation and the other describing the ideal situation. The gap between the two provides the basis for setting goals for each organization. Here is how you get there.

Combine the items in the two lists into comprehensive statements about the present undesirable and future desirable situations. Now have the group help you compose a statement that describes the gap between the two. This is the problem statement, and it will read something like this:

"We need a means for helping unmotivated summer program participants acquire the basic academic, personal, and pre-employment skills that will enable them to locate employment, pursue further training on their own, or be more successful as students."

Make sure that there is agreement on the problem statement from each work group member. The members in turn, must make sure that their organizations concur. If the climate for change is good and the work group member is well connected and influential, there should be no problem in getting concurrence of his/her respective organization. (Now you will understand the importance of developing readiness for change within the collaborating organizations.)

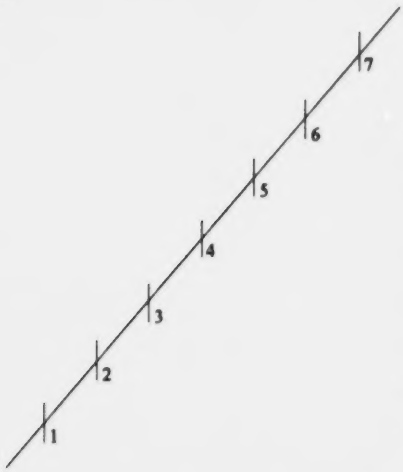
Step 3: Developing Work Group Leadership

By now, the work group is ready to tackle solutions to the problem. From this point on, the group will need to make some decisions about group leadership. Remember that we are trying to manage change in several organizations at once, using basic change agent skills and a work group that consists of personnel who may not be part of your organization. Your influence will be limited and work group members' loyalty will be divided between the goals of their organizations and the goals of the group.

Nevertheless, groups still need leadership to manage and direct change. There are two types of decisions that must be made: who will lead and how he/she will guide the group's decision-making process.

The group may select a leader based on seniority or may select someone most able to lead or who is the most knowledgeable. Leaders must be willing to devote the time and energy needed for leadership tasks and, frequently, this is the person who has the biggest stake in the summer enrichment program—the SDA representative.

The group must also determine the type of leadership that will achieve their objectives. The following continuum describes various group decision-making behaviors, beginning with the greatest involvement of the leader and proceeding to the least involvement of the leader.[2]



1. Leader makes decision and announces it to group.
2. Leader makes decision and "sells" it to the group.
3. Leader presents ideas, invites questions, and makes decision.
4. Leader presents tentative decision subject to change.
5. Leader presents problem, asks advice, and makes decision.
6. Leader defines limits; group makes decision.
7. Group defines limits; group makes decision.

When work group members determine their leader and type of leadership or decision making they want, they are more likely to commit to the process and the group's decisions. Much of the power struggles that undermine the effectiveness of interagency groups develop around issues of leadership and control. Once these are neutralized, the group can move forward with the substantive issue of solving the problems of youth learning.

Step 4: Planning the Change Strategy—Group Problem Solving

With the statement of the problem and descriptions of the present undesired state and the desired future state before the work group, develop a list of factors that are barriers to reaching the desired state and factors that facilitate or support reaching the desired state. The fancy term for this is "force field analysis."

Flip charts come in handy at this point also. (We should alert you to invest in lots of flip charts.) By drawing a vertical line down the center of the paper and labeling one side "barriers" and the other side "aids," you can record and compare the group's thoughts about the factors that will influence the solution to the problem.

[2] From "Change Agentry," Florida State University Department of Education, Division of Curriculum and Instruction.

You will find on the "barriers" side some mention of ineffective teaching techniques, lack of funds, irrelevant materials, etc. On the "aids" side, you will probably find mention of JTPA program staff and funds, school resources, and other resources represented by the group.

A comparison of the completed lists will suggest how resources might be applied to negate the barriers to achieving the desired state. It will also point out gaps in services and resources needed to address this problem.

Now your work group is ready to plan a strategy for addressing the problem of enhancing youth's learning potential. One of the resources for addressing this problem is the summer program funds available through the SDA. This affords you the opportunity to present to the group your information about summer enrichment programs that revolve around the concept of integrated work and learning. By applying your "using information" skills, you can make the case for adopting one of the summer enrichment strategies as a key element in the plan to reach the desired state.

Don't be surprised if other plans also surface from members of the group. Do not reject these plans out of fear that they will compete with a summer enrichment strategy that you favor. Instead, follow the guidelines in the handbook on group problem solving, which calls for the following:

- Clarification of a suggested proposal to ensure a good understanding of it and its relationship to the goal of achieving the desired state
- Testing of the consequences of the proposal to ensure a complete understanding of its strengths and weaknesses, pros and cons, and advantages and disadvantages
- Clarification and testing of alternative proposals
- Determination that the group is ready to make a decision (i.e., all options and needed information are on the table)
- Group commitment to a decision about alternatives based on agreement about the best compromise or proposal presented
- Summary of the process and the group's consensus about the solution to the problem; this is where the decision is finalized

You now have a work group in agreement on the nature of the problem, the group's goal (the desired state), and a plan for achieving the goal. To ensure that the vision embedded in this plan is implemented, turn the group's attention to an operational plan for implementing its decisions.

An operational plan is one that sets out the activities, timetable, and interim objectives that realize the concepts and ideas in the plan. Specific organizational changes, contributions, and even personnel assignments are products of the operational plan.

Operational plans follow easily in the footsteps of decision making when care is taken to stick with the recommended process described in Steps 1 through 4. First, the organizations involved are ready for change. Second, there is agreement on the nature of the problem and what the group is trying to accomplish. Third, there is strong commitment to a proposed course of action because the group participated in determining how decisions would be made and everyone had an opportunity to present their proposals for consideration. Fourth, the group has agreed on a proposal for solving the problem.

Another factor that greatly facilitates the effectiveness of the plan is the communications network, which is a by-product of the process. The work group is a strong linchpin among the various organizations it represents and provides a communication conduit that bridges barriers to two-way communications. First, it is informal and direct, allowing work group members quick access to each other's policy makers, information sources, and power structures. Second, it bridges differences in organizational contexts with a common, new context—the context of the work group. Communications are less likely to be crossed when there is a shared context.

It is wise to retain the work group as an oversight committee that can monitor the progress of the summer enrichment strategy. Its ongoing evaluation is one way to keep the authority and skills needed to perform the fine tuning that every new program inevitably requires and to ensure that the summer enrichment program in practice corresponds to the plan.

Step 5: Anticipating Contingencies

As you make your way through the change agent's work, there is always the possibility that the work group will not decide on a solution to the problem that incorporates one of the summer enrichment strategies in the Field Kit. Perhaps the group will endorse increased hours in a traditional classroom setting or using computer-aided instruction or another different teaching approach.

So what happens if the work group does not buy the integrated work and learning concept despite your best efforts to sell it? Do you abandon the work group? Write letters to the editor? Throw a tantrum? Withhold the SDA's support?

The best solution to this problem is to make sure it doesn't happen (i.e., use your communication and facilitation skills so that your arguments for the value of integrated work and learning are overpowering). But, if you do find yourself in this dilemma:

- Stick with the work group and make the contributions called for, but stipulate a condition that the proposed approach be evaluated objectively. This sets the stage for later revisions more along the lines of a work/learning model if your assumptions are correct and learning gains fail to meet expectations using the work group's alternative approach.

- Stick with the work group and propose two strategies—their alternative approach and a work/learning model—as a way of testing the efficacy of the different

approaches to summer enrichment. If your approach works better, the case is made for your proposal to be implemented next summer.

- Stick with the work group and concentrate on increasing the organizations' readiness for change. On your own, set up a small version of an integrated work/learning model as a demonstration, research ways to overcome institutional barriers, and sell, sell, sell your concept.

Note that each alternative shares one common theme: stick with the work group. Your work group is your group and you are stuck with its members as the agency partners with whom you must collaborate to be a successful operator of a summer enrichment program. You just don't have the option of doing this alone.

However, you may be able to chip away at resistance by remaining connected to the group, demonstrating the value of your approach (see Chapter 6), and maintaining a good relationship. Success may come in small bites rather than a feast, but it will come if you commit to the process.

How Do I Overcome Resistance to Change?

Within the confines of the management of human services by public agencies, there comes the time when change in modus operandi is either mandated or desired. In either case, the change is invariably resisted, even though it may appear to be either unavoidable, as in the case of taxpayer mandates, or very appealing, as in the case of change that better serves organizational goals. This phenomenon is observed so consistently that we are spending some time on it to make sure that you understand how it affects your success in bringing about changes required for summer enrichment. This section of the chapter examines the basis for resistance to change and techniques for overcoming it.

Resistance to change is largely rooted in fear: fear of loss of control, power, or status; fear of personal inadequacy in the face of managing new responsibilities; or, simply, fear of the unknown. People don't like to talk about their fears even when they are able to recognize them as factors in their behavior—and that's not a common occurrence. Therefore, you must resolve these fears without confronting them directly. This is done in how you organize the process and how you interact with the group.

You will recall the importance that we place in allowing the group to determine group leadership and the decision-making process. This is a technique for reducing the fear of loss of power in the group. The process that we describe also calls for clarification of each proposal being considered by the group. This is a technique for reducing the fear of the unknown as well as ensuring good communications. Making sure that each decision represents consensus is yet another way that fears are modified by the process.

If you adhere to the process described earlier, **you only will have to learn how to use your interactions with the group as a means of reducing resistance to change.** That is the topic that we will take up next.

The people you interact with must be approached at **two** levels: the cognitive or intellectual level, where rational judgments are made, and the emotional level, where fears reside. Rational arguments for using an integrated work and learning or contextual model for enriching summer programs are dispersed throughout this guide and the Brandeis Field Kit. We won't review them here other than to emphasize the importance of doing your homework and understanding the concepts and practical considerations for applying these techniques before you present proposals to the work group.

Instead, we will focus now on techniques for dealing with the emotional natures of the people engaged in organizational change. These will be primarily staff who are affiliated with the schools, worksites, SDA, and, of course, your work group.

Let's begin by understanding the emotional side of human nature, which influences how we behave. To do that, we have to first take a look at the structure of the brain that controls and directs all our actions. To get us through this discussion without eyes glazing over, we will simplify the many different subdivisions of the brain into three parts.[3]

The brain stem, the most primitive layer, is responsible for reproduction, self-preservation, and vital functions such as breathing, heartbeat, and other bodily functions that occur without your conscious control. All animals with vertebras, from reptiles on up, have one of these.

At the top of the brain stem, flaring out on two sides, is the part of the brain called the limbic system, which is where emotions originate. This part of the brain can be surgically stimulated to cause animals to react in fear or aggression.

The two parts together can be thought of as the "old" brain or the primitive brain because they control the automatic responses of the body.

At the top of the brain is the cerebral cortex—a large area that occupies most of your skull. This is where cognitive functions such as balancing your checkbook, conjugating verbs, and planning summer programs are located. Let's call that the "new" brain because in terms of evolution, it hasn't been around very long and is not as well developed in less evolved species.

To reiterate, to overcome resistance to change in the new brain, you must offer well-organized information and logical arguments. The new brain likes things that are well organized and logical, and we have provided you with lots of well-organized, logical material that can be used for this purpose.

But the old brain is concerned not with logic but with safety. Its range of responses are dominated by the "fight or flight" options. It doesn't organize information very well either. Detailed information sifts down to the old brain from the new brain in the form of hazy, vague, broad categories. In addition, time is not linear to the old brain (i.e., everything that ever was, still is).

[3] Paul D. McLean, 1964, "Man and His Animal Brain," *Modern Medicine*, February 3.

For example, let's say that you proposed a summer enrichment strategy that called for worksite supervisors to spend time with teachers to outline the work tasks and translate them into SCANS skills. The worksite supervisor's new brain registers Ms. Smith, the young, progressive teacher with an engaging smile and pleasant manner. The old brain sees old Ms. Thornberry, your sixth-grade teacher who continually humiliated you by asking you to recite in front of the class passages with words you could not pronounce. The old brain registers only "awful teacher person" and wants to protect your fragile ego by directing you to flee before old Ms. Thornberry does it to you again.

So keep in mind, for every new brain out there that you must convince, there is an old brain programmed with some painful memories you may be stimulating.

So what do you do about that? One answer is to develop the interactive and communication skills that soothe the old brain and make it feel safe. Attached as Appendix B is a handbook, *Interactive Skills for Change Agents*. In it, we have compiled do's and don'ts for change agents, how to give and receive feedback, and basic communication skills. All of these are aids for soothing the old brain by creating a safe environment and avoiding the stimulation of a fight-or-flight response. In addition, it will help you be effective in dealing with the old brain to remember some of the situations that commonly provoke anxiety and fear.

Chief among these are situations that endanger one's self-concept or self-worth, such as the case of the worksite supervisor who was not terribly articulate in the sixth grade. Asking people to take on new tasks or situations is comparable to giving them a test because it is an assessment of untested abilities. You can reduce "test anxiety" by providing people with a no-fail practice first, so that they can gain some confidence. In the case of the worksite supervisor, you could provide a set of written instructions with examples and exercises for him/her to take home before meeting with the instructor. It is also reassuring to have a partner; therefore, pairing worksite supervisors may ease anxieties.

Confidence and self-concepts are enhanced by such praise as "You are so good at organizing work for our summer participants. I know that you will be a great help to Ms. Smith." This is another way to reduce anxiety about new situations.

Upgrading titles for people who take on new responsibilities for enriched summer programs is another antidote for anxiety. People whose self-images are enhanced by the prospects of change will welcome change and be enthusiastic supporters.

Trust is another manifestation of safety. To the extent that there is a good trust level among work group members and organizations, the old brain will snooze contentedly throughout the change process. But if past experiences are marred by a poor trust level, the old brain will be alert and looking for danger.

Trust is contagious though. If you put yourself out there and demonstrate a willingness to take risks and be accountable, you are sending a strong safety message to the others. You trust the new approach to basic education, you trust the capability and commitment of the other work group members, and you trust your ability to accomplish your goals.

Trust in you, personally, the change agent, is an important safety issue. You must conduct yourself in a manner that inspires personal trust. It is important to be truthful even if it means admitting ignorance or providing information that is not likely to be well received.

You must do everything you said you would, even if it is more difficult than you thought it would be or if it is a minor detail for which you don't have time. Excuses weaken the trust level. Demonstrate commitment and conscientiousness in all your tasks. Group members must believe that you take the change process seriously and that you always do what you say.

Above all, respect the people with whom you are working. Respect must be genuine; therefore, at a minimum you must respect the differences represented by the people engaged in change. After all, it is their different perspectives and experiences that enhance the strategies for summer enrichment. Everyone has something valuable to contribute, even the naysayers who force you to think more clearly about the changes you are proposing. Work on building feelings of respect for your colleagues so that your feelings are genuine. It will make a noticeable difference in your interactions with them.

Whereas the response to fear is typically withdrawal or stonewalling, the response to anger, when people are really feeling threatened, is aggression. Interactions focused around change often turn into power struggles in which the substance of the debate is immaterial to the process. People are locked into a power struggle—a contest of wills.

You know you are in a power struggle when attempts at compromise are rejected and ultimatums are made or other means of force are used. The old brain is in charge, and logic will not prevail.

At such times, give in or table the discussion when the struggle is between others in the group. Power struggles are very destructive, and there are no real winners. It is better to find another avenue for your objectives than continue a futile confrontation that will inevitably lead to damaged relations and further resistance.

By being aware of the role played by the old brain in resistance to change, you are forearmed. Listen carefully when resistance is manifest, and consider how you might make the person feel safe while engaging in change.

There is more that could be said about overcoming resistance to change, but this is enough for now. If you can absorb this and use it effectively, you are ready to read some of the books included in the bibliography to advance your change agent skills.

Chapter 2

Marketing Work and Learning

Chapter 2. Marketing Work and Learning

Introduction

In the previous chapter, we talked about the process of change and the many roles that you must assume when you become a change agent. One of these roles is to market integrated work and learning to schools, worksites, and other community partners so that they will commit to the changes needed to support academic enrichment.

This is best approached through a marketing orientation. In other words, think of the people with whom you interact as customers of the work and learning program. Then determine what their needs and wants are in relation to their participation in a summer enrichment program. You can then use this information to develop arguments to persuade people to contribute to the program to ensure its success.

You will recall that in Chapter 1 we mentioned that presenting information and facilitating collaboration are primary tools of the change agent. This chapter offers some advice to help you develop these tools to become an effective marketing agent for summer enrichment. The topics covered here include marketing (presenting information to "sell" a new approach to participant learning) and networking.

Marketing and networking are elements of a successful campaign for attaining the support of all stakeholders needed for implementing a work and learning program. Although achieving "buy-in" of this magnitude will be difficult in some communities, there are processes that make it possible. The sections that follow provide concrete guidelines and examples for undertaking this process.

Marketing: What Is It and Why Should I Care?

Marketing, in the context of this discussion, is simply campaigning for support for an integrated summer work and learning program for youth. The marketing process involves the development and implementation of a marketing plan. In other words, identify your customers, figure out how to reach them (What are their "hot buttons"?), and develop a plan to win their support for your program.

What Is Marketing?

Marketing is any activity conducted to satisfy the needs and wants of customers. Marketing isn't just advertising, sales, promotion, and publicity. Although marketing includes these activities, it also includes innovation, market analysis, planning, and control.

Why should you care about marketing? After all, this work and learning program is not about selling anything, it is about improving the way young people are prepared for the work world. You should care about marketing for this reason: If Point A is where you currently are in building the necessary coalition to implement your program and Point C is having the program in place, getting from Point A to Point C depends on marketing.

The Marketing Concept

Peter Drucker, renowned management analyst, summed up the marketing concept best: "Marketing is so basic that it cannot be considered a separate function. ... It is the whole organization as seen from the point of view of its final result, that is, the point of view of the customer." The marketing concept is a management orientation that deems the organization's key task to be determining the wants and needs of target markets and adapting the organization to satisfy the markets' wants and needs efficiently and effectively.

In Chapter 1, the responsibility of a change agent was characterized as facilitating change, not making change happen. The skills needed to facilitate change—creating a climate for change, using information, and building collaboration—are the same analytical and interpersonal skills needed to implement the marketing concept.

To apply the marketing concept to the task at hand—building a coalition to implement work and learning programs—the first step is to identify your customers and determine the nature of their needs. The next steps are to develop a marketing plan and then develop the skills necessary to execute the plan. Having successfully completed these steps, the task of setting the plan in motion, even though not a piece of cake, is certainly easier than it would have been.

Appealing to the Partners

We can define the people and organizations targeted in this marketing campaign as customers, not because we want them to buy something, but because we want them to buy in to our concept of summer work and learning programs for youth. These customers are the partners whose involvement is crucial to the success of these programs. These key players include a variety of school personnel, local employers, private industry councils (PICs), and other organizations that serve youth. There may be other people in your community who should be included in this list, and part of your initial marketing activities should be to identify these individuals.

To sell your customers or community partners on the idea of academic enrichment and summer work and learning programs for youth, the first step is to target your approach to each specific audience. This is done by determining the benefits the target audience will gain through their involvement. One rationale that should be always included in your appeal to community partners is that integrating work and learning is a well-documented, effective method for enriching the academic and work-related foundation essential for youth to be successful workers (i.e, it is good for youth in general and for summer participants in particular).

However, be prepared to make additional arguments to persuade your community partners to change the way they do business. Certainly, everyone wants to do the right thing regarding the young people in the summer program. However, most of your community partners are already doing something. To convince people to change at some cost to themselves, you must be able to answer one basic question: "What's in it for me?"

The answer to this question will be different for each of your target audiences, and it has nothing to do with altruism or with the features of the program (e.g., focus on SCANS skills, use of the portfolio, etc.). The answer has to do with how the organization will benefit by making the change. Generally speaking, a benefit is something that solves a problem or contributes to the success or profitability of the organization.

A feature/function/benefit analysis will help you determine how to sell to a specific audience. This type of analysis lists the program features, describes the function or utility of the features, and then lists the benefits of the features to a specific person or organization. Following is an example:

Audience	Feature	Function	Benefit
Employer	Linking tasks performed by students to skills necessary for success in work world	Helps students understand how what they learn in school is relevant to the work world	Contributes to the development of a future workforce that has the skills needed by the employer

To determine the benefits of a feature, think about how valuable the feature is to the target audience in filling a need or solving a problem. People buy things based on the anticipated benefits of the features rather than on the features themselves.

Because benefits will change for each of your target audiences, you will need to base your approach on how the feature benefits the audience, not on the benefits in general. If you are having trouble determining the benefits to a particular audience, you need to do more research: talk to more people in positions related to the target audience, brainstorm with your coworkers, and put yourself in the other person's place and concentrate on what constitutes the bottom line for him/her.

Following is some information about the wants and needs of your target audiences. You will need to adapt this information to your own community and circumstances to develop an approach for achieving buy-in of an integrated summer work and learning program for youth.

School Personnel

An important issue to keep in mind when analyzing the wants and needs of school personnel is that different categories of school personnel will respond to different

arguments for establishing a work and learning program. Administrative personnel, teachers, counselors, and alternative education staff are separate target audiences for your marketing campaign.

Administrators will generally focus on "the numbers." One of the expected benefits of work and learning programs is that the average daily attendance (ADA) rate will increase. ADA is the basis for computing school budget allocations in most areas.

This expectation is based on the experience of demonstration programs in which students had greater motivation to learn at the end of summer than they had at the beginning of the program. Improved motivation not only raises attendance levels, it also lowers drop-out rates—both of which have a positive affect on ADA, and subsequently, school allocations.

The underlying assumption here is that students involved in the program are at-risk youth who habitually do not attend school. Given a positive work and learning experience, these students are likely to attend school regularly and to graduate, thereby reducing the drop-out rate.

You can focus your appeal to classroom teachers through their interest in methods that make students more enthusiastic and willing learners who will be able to succeed, even in the context of traditional school lessons. Motivated students are less likely to present discipline problems or to be disruptive in class. In addition, teachers will appreciate the fact that academically enriched work and learning programs can reduce the loss of learning generally experienced by students during the summer months.

School counselors, on the other hand, often have difficulty seeing the connection between school and work for at-risk students. Work and learning programs give counselors, as well as vocational and cooperative education teachers, the foundation they need to make the association between academics and work in school vocational training programs.

Employers

Some employers resist the work and learning concept because their participation represents a greater investment in personnel time, and, as you know, time is money. You can counter this by pointing out that research shows that the labor force is shrinking! On top of this, students are graduating from high school without the basic skills that employers need, and 25 percent of young people drop out of school. The impact of these situations is clear: employers will have to pay more to train entry-level employees who are deficient in basic workplace competencies.

Involvement in summer work and learning programs will give employers the opportunity shape the workforce of the future—their workforce. Employers will be able to build on SCANS Commission findings to tailor learning to their own industries. Additionally, they will get more out of their summer employees because the programs motivate young people to work, learn, and show up at the worksite everyday! Improvement in punctuality and attendance may be well worth employers' support of an enriched summer learning program.

Private Industry Councils

When you approach PICs, you will probably have to answer the following question: "Why should we spend more money to serve fewer students?" Because crime, especially crime perpetrated by young people, is the number-one problem cited in current public opinion surveys, you can tell PICs that summer programs can keep young people off the streets and under adult supervision during long, hot summers. Even though an enriched summer program can be expensive to implement, it can pay off in the long run by reducing the number of young people on the street.

If PICs do not see a connection between summer programs and a reduction in delinquency, you can counter with the argument that crime is largely the result of attempts to satisfy needs by using methods that violate society's rules of conduct. Youth are less likely to commit crimes if they can satisfy their needs by using alternatives that comply with society's rules. Gainful, gratifying employment is a principle alternative for doing this. The high rate of illiteracy and low job skill levels of inmate populations is hardly coincidental. By not addressing one of the root causes for crime, communities perpetuate the problem. Let's trade short-term temporary solutions for long-term permanent solutions.

Another argument you can use to convince a PIC to make the trade-off between the low numbers of youth it will serve with a summer enrichment program and the high costs for such enrichment may reside in its mission statement. Most PICs have mission statements that articulate their goals and strategies for achieving these goals. It is likely that facilitating the movement of young people from school to work fits in with a PIC's mission.

Remind PICs that we are the only industrialized society that focuses on moving students from high school to college and virtually ignores the fact that most high school graduates do not go to college. The lack of a mechanism to move students who are not college-bound into employment is at least partly responsible for our extremely high drop-out rate. Without this mechanism, graduates and drop-outs enter the work world without the necessary skills to become valuable assets to employers.

Point out to PICs that summer enrichment programs for youth provide a necessary bridge between school and work. Through involvement in the program, the PIC can join forces with schools to give young people the opportunity to offer something tangible to employers. PIC involvement may also reduce the caseload of future summer youth programs; presumably, students who are successful in work and learning programs will need less future intervention.

An additional selling point is that the summer enrichment program need not be limited to youth programs. The PIC's adult clients can also benefit from integrated work and learning. The summer program can permit the PIC to experiment with new teaching methods on a small scale. Gaining the experience of operating this type of program for young people can give the PIC a head start in establishing a work and learning program for adults.

Other Youth-Serving Organizations

Organizations that are committed to youth (e.g., YMCA, YWCA, Boy's and Girl's Clubs, etc.) can contribute substantially to an integrated work and learning program. First, these organizations make good worksites for youth in summer programs because they are youth-centered, understand your objectives, and recognize youth development issues. By becoming a worksite, the youth-serving organization has the opportunity to contribute to the design of the program, and at the same time, to benefit by having summer employees who have a personal stake in the organization's mission.

Second, these organizations' services typically support the goals of academic enrichment. For example, YWCAs and YMCAs sponsor field trips and cultural enrichment activities for youth. These activities augment what young people learn at the worksite by expanding their horizons and knowledge. Some teach life skills such as swimming, defensive driving, and basic cooking.

Third, youth-serving organizations can provide role models and tutors. Role models in the form of leaders who establish warm, supportive relationships are important in youth employment programs. Tutors are important for participants who must overcome learning barriers.

Developing a Marketing Plan

There are probably as many formats for developing marketing plans as there are people who develop them. The important thing about a marketing plan is not what it looks like, but what it does. Peter Drucker observed that "plans are nothing unless they degenerate into work!"

A successful marketing plan should be specific, pertinent, observable, measurable, and above all, achievable. For your plan to be achievable, everyone who will be involved in carrying out the plan should be involved in developing the plan. In this case, nothing succeeds like ownership!

To plan where you want to go, you need to know where you are. Therefore, the first steps in developing your marketing plan are to evaluate the forces that affect your potential for success and to answer the six basic marketing questions: why, what, who, where, how, and when.

There are many forces, both internal and external to your organization, that may affect your ability to successfully market the work and learning concept. Following the adage that knowledge is power, the more you know about these forces, the more you will be able to control them. This is sometimes called an "environmental analysis."

External forces, which are those that exist outside your organization and your partner organizations, offer little opportunity for control. However, if you are aware of these forces, you can avoid being blindsided by them. These forces include demand for program services, other programs competing for the same clients, and the economic and political

climates. To analyze these forces, you must rely on the expertise of others in your organization and the coalition you develop to implement the program.

Internal forces, which exist within your organization and your partner organizations, may work against successful implementation of an academic enrichment program. In Chapter 1, we talked about understanding the organizational context for change. Analyzing internal forces is a method for understanding the organizational context. To analyze internal forces, you must answer the following questions about your own organization and your partner organizations:

1. Where does the work and learning program fit in relation to other programs run by the organization?

2. What are the budget limitations?

3. What resources are available to you?

4. What people in the organization have skills that can help the program and/or your marketing effort succeed?

5. What is your organization's relationship with the partner organizations?

6. What is your organization currently doing about marketing its programs/services?

These questions cannot be answered and then ignored. They must be reviewed continually to ensure that internal forces have not changed.

With a firm grasp of the organizational context, you are ready to develop a marketing plan that reduces the barriers to change that may block the adoption of a summer enrichment program. Think in terms of how you might address these barriers using the arguments discussed earlier. With your objectives and strategies in mind, give some thought to your approach in implementing the plan.

Marketing Skills for Change Agents

Appendix A includes the marketing skills you will need to implement your summer enrichment program. Included are tips on conducting effective briefings, planning meetings, maintaining the direction of meetings, and handling group problems. The Appendix also contains a section that will help you run focus groups and that explains how such groups are useful in marketing.

Networking Skills

Building a coalition of key players to support the development and implementation of your work and learning program is essential to program success. To begin building your coalition, rely on the network you have developed from your involvement with employment and training programs. A network is an informal association of people who have a common interest or are working toward a common or complementary goal. In other words, it's a buddy system! Networking is the art of making the most of your relationships.

Networks are particularly important when you have no official control over people who can affect the success of your program. You must depend on your relationships with these people and others in their organizations to bring about results that would otherwise be a consequence of control.

Building a Coalition

The process of building a coalition depends largely on networking skills that are closely related to—guess what—marketing. Here are the steps you will need to follow to build your coalition:

1. **Plan the coalition.** Determine the purpose of the coalition. Convene colleagues who support the program concept, and brainstorm with them to develop a succinct purpose statement. This statement should define your goals, evaluate your position in relation to these goals, and define the support, assistance, advice, and information you will need to help you achieve these goals. Your starting point is your overall goal—to develop and implement a summer youth enrichment program.

2. **Identify the members.** You can accomplished this in the same brainstorming session used in Step 1. Identify the organizations and individuals you want in your coalition, determine what roles you want them to play, and analyze what you want from them and what you must provide them.

   You and your colleagues have networks that probably include people from your respective organizations who, even if they are not appropriate for the coalition, can be valuable assets. They can help you determine which individuals are appropriate for the coalition and can suggest how to recruit them as coalition members.

3. **Make connections.** When you have completed the first two steps, you are ready to begin contacting the key players and ask them to be involved in the coalition. Review the information on marketing, and have all your "ducks in order." You must ensure that you have succinct arguments to counter any objections you may encounter.

Use your network to connect with people! When you make an initial contact, mention that you were referred by so-and-so. This helps the contact person get past the initial misgivings that people generally have for "cold calls." Keep track of who you contact and the results of each contact.

4. **Cultivate the coalition.** Developing your coalition will take more than simply developing agendas and running meetings. To build the coalition into a real working body, you will need to do some "schmoozing" with the members and facilitating their relationships with one another. Keep in mind that this program is your priority, but it may not be everyone else's. When you say that you are going to do something, do it and do it on time. Also, be available to assist other coalition members in keeping their promises.

Chapter 3

Changing Worksites to Support Contextual Learning Strategies

Chapter 3. Changing Worksites to Support Contextual Learning Strategies

Introduction

The Brandeis Field Kit describes strategies for integrating work and learning in teaching SCANS competencies and foundation skills. One is a work-based strategy in which all learning and skill-building occurs through work-related activities at the worksite rather than in a classroom. In this strategy, SCANS competencies and foundation skills are integrated into a workplace environment in which entwining work and learning provides new opportunities for students to apply knowledge and skills in real-world settings.

Another strategy integrates work experience into classroom instruction to create a contextual setting for teaching SCANS skills. This strategy also calls for worksites to make changes to support and enrich classroom activities.

To complement the materials in the Field Kit, this chapter presents some methods that will help worksite personnel operate a work-based learning strategy or support a classroom-based strategy. These methods may involve preparing curricula and lesson plans for summer participants, supervising and assessing student progress, or working with classroom teachers.

The chapter is organized around two topics. The first topic addresses the tasks involved in setting up a work-based strategy: identifying the SCANS competencies and foundation skills embedded in the work, developing a curriculum to support selected work activities, and developing a checklist of interim objectives. The second topic provides some tips on how to incorporate mechanisms that enable worksite personnel to reinforce classroom instruction, ensure that teachers and worksite staff support one another, and help worksite staff assist in portfolio assessment as described in the Brandeis Field Kit, Step 7.

In developing this information, we tried to take into account the needs of the employing organization as well as those of the youth. The techniques described here, however, represent only a sample of the methods you can use to integrate learning-rich activities into a real work environment. You should draw heavily on your own knowledge and the practical knowledge of people in your community to make the summer enrichment effort a powerful learning experience for young people.

It is important to point out that the results you are looking for in your summer enrichment program will probably not materialize in a single summer. This is an incremental process that should be cultivated with committed worksites over the course of many summers and perhaps into the school year.

Developing Worksites for a Work-Based Strategy

Of all the strategies for teaching SCANS skills, teaching them as an integral part of the work experience using on-site personnel is the most innovative and requires the greatest adjustment for the people involved. Worksite personnel must stop regarding participants as free labor to regarding them as students engaged in a learning program for which the personnel are wholly or partially responsible. Personnel must accept the notion of dual goals: the production goal as well as the learning goal of the students.

We strongly recommend a training or orientation of worksite personnel, case managers, and others who might be associated with a work-based strategy. This training should provide instruction, exercises, demonstrations of all abstract information, and plenty of opportunities for group discussion. The topics should include methods to convert worksites into contextual learning laboratories and collaborate with classroom teachers.

Above all, the training should help worksite staff to focus their attention on student learning objectives. This is where your skills and efforts as a change agent are critical. Your worksite partners are the most critical and irreplaceable elements of two of the three strategies for summer enrichment: the work-based strategy and the strategy that integrates work experience into classroom instruction.

The sections that follow provide you with some materials that will be useful for this purpose. We also suggest that you secure copies of the Brandeis videotape that shows real worksites demonstrating work-based strategies. This videotape will inform and inspire your staff.

Identifying SCANS Competencies and Foundation Skills

The first task for worksite supervisors is to describe the skills and knowledge required for the participant to perform his/her job and the duties of the job. In the best of all possible worlds, employers will have a carefully devised training plan or a documented set of skills and competencies based on job descriptions or procedures manuals. The reality, however, is that many employers do not have well-articulated job descriptions.

Frequently, job descriptions are poorly developed or outdated and represent a general list of things employees ought to know or be able to do. If there is a training manual, it may not reflect the actual work being performed. Many employers have the perception, sometimes accurate and sometimes not, that the job is pretty basic. They fail to see the value in developing written job descriptions.

It is a safe bet to say that most employers have not performed job analyses that identify the basic SCANS skills and competencies each job requires. Although it is unquestionably time-consuming, your first activity is probably going to be a job analysis.

We have provided a sample job analysis survey that worksite organizations might want to undertake (Exhibit 3-1). This sample was taken from Fort Worth Project C3. In Fort Worth, information was collected from local businesses and fed back into the city's school system "to adequately prepare today's students for tomorrow's workplace." The same procedure will give you an analysis of summer jobs that identifies the SCANS skills embedded in the jobs.

Give yourself plenty of time to analyze worksite jobs. Begin the job analysis 4 to 6 months before the beginning of the summer youth program so that there is time to develop a curriculum before students arrive. This time factor is another reason for integrating summer programs with year-long programs.

The SDA, participating schools, and external consultants are other resources that can be used to help organizations design a job analysis survey. No worksite can be expected to undertake this on its own, with no help from a knowledgeable resource.

The job analysis process begins with a decision about where in the organization youth in summer enrichment programs will be working. Relevant job descriptions and the worksite supervisor can determine which worksite personnel will be the supervisors who will assist with job analyses. As you consider the following process for analyzing jobs, consult Exhibit 3-1.

1. Each job analysis should be performed separately by two groups: employees and their immediate supervisors.

2. The worksite supervisor who hands out the Job Analysis Forms must fill in the required information at the top the forms before giving them to employees and their supervisors to complete.

3. The worksite supervisor should provide orientation and training to employees and their supervisors before having them complete a Job Analysis Form. For each job, a form should be completed by 3 to 4 persons in consensus.

4. After completing the Job Analysis Form, employees and supervisors should be provided with the Summary Rating Form and Instructions and the Definitions of Levels of Proficiency.

At the conclusion of this activity, the organization will have a compilation of the tasks and SCANS foundation skills and competencies that make up the analyzed jobs. This will make it much easier to guide the development of work activities that explicitly demonstrate the use of SCANS skills.

Instructions for Completing the Job Analysis Form

1. To adequately define the employability skills needed for the workplace, job analysis must be systematically performed for many different jobs.

2. The CEO and the C³ company representative should select a minimum of five positions for analysis. These positions should represent a variety of jobs and encompass a wide range of the skills/training necessary to perform the required work successfully.

3. The C³ company representative should designate who will complete the job analysis. Each analysis must be performed separately by two groups:

    1. Workers on the job
    2. Immediate supervisors of these employees.

4. The C³ company representative should fill in the information in the top portion of the attached Job Analysis Form before giving it to workers and their supervisors.

5. The C³ company representative must provide orientation and training to the workers and their supervisors before having them complete the Job Analysis Form. Three to four people working collaboratively should complete the form.

Adapted from Fort Worth Project C³.

6. In separate groups, workers and their supervisors should complete a job analysis on the same position. Use the following:

Job Analysis Procedure

(See attached Job Analysis Form.)

Step 1

Think of the job you are about to analyze. What do workers in this position do? Discuss this question with three or four workers and/or supervisors. List the four or five major tasks commonly performed by workers in this position. Be specific. Each task should consist of observable behaviors (e.g., one common task performed by secretaries is likely to be taking and handling telephone calls).

In group discussion, continue to identify common tasks performed in the designated job until you reach consensus on four or five tasks.

Step 2

Identify and discuss what kinds of skills are needed to successfully perform these major tasks. In the example for secretaries, the major task is taking and handling telephone calls. Some skills a secretary needs to successfully perform this task likely include the following:

1. Know how to use equipment to answer, transfer, and forward calls and perform other functions (e.g., conference, camp[?], etc.).
2. Be able to listen effectively and communicate clearly (e.g., provide accurate information, decide proper course of action).
3. Be able to take clear, legible messages.
4. Know the schedule of office staff.
5. Know proper telephone protocol (e.g., being courteous, helpful, friendly, knowledgeable, etc.)

Be thorough and systematic in performing Steps 1 and 2. After completing the Job Analysis Form, give it to the C[1] company representative.

7. Return a job description for this position with the analysis form.

Job Analysis

Company/Organization: FWISD

Job/Title: secretary

Level of education necessary for this position: high school diploma, secretarial/business courses

Dictionary of Occupational Titles (DOT#): 201.362-030

Person(s) completing form: Doris Baird, Louis Ellison, Sheila Hicks, Nancy Jarratt

Position of person(s) completing form: secretary

Step 1 List four or five major tasks commonly performed on this job.	Step 2 Explain what you skills are needed to successfully perform the major task listed in Step 1.
1. Taking and handling telephone calls	1. Know how to use equipment to answer, transfer, and forward calls and perform other functions (e.g., conference, camp[?], etc.). 2. Be able to listen effectively and communicate clearly (e.g., provide accurate information, decide proper course of action). 3. Be able to take clear, legible messages. 4. Know the schedule of office staff. 5. Know proper telephone protocol (e.g., being courteous, helpful, friendly, knowledgeable, etc.)
2. Using word processing to produce reports, memos, charts, and other documents	1. Be able to read and understand software manual. 2. Have keyboarding skills and be able to perform application of software packages. 3. Have statistical typing skills. 4. Be able to decipher handwriting. 5. Have knowledge of good design/layout of materials. 6. Know correct use of grammar, punctuation, spelling, and sentence structure. 7. Have knowledge of departmental and FWISD procedures for producing and disseminating reports. 8. Be able to work under pressure to meet deadlines and make revisions.

Note: Attach a job description of this position to this job analysis

Step 1 (continued) Major tasks (continued)	Step 2 (continued) Explanation (continued)
3. Make travel arrangements	1. Have knowledge of FWISD forms. 2. Have knowledge of FWISD travel policies. 3. Be able to communicate with travel agents effectively. 4. Have the ability to coordinate supervisor's needs and preferences with airline schedules. 5. Have the ability to listen and implement instructions.
4. Facilitate presentations	1. Have knowledge of velo binder. 2. Be able to make transparencies and place in frames. 3. Be able to coordinate the duplication of multiple copies within a specified time frame. 4. Be able to schedule meeting areas. 5. Be able to be flexible.
5. Keep everything running smoothly	1. Be able to prioritize tasks. 2. Be able to tactfully communicate needs and schedules. 3. Be able to keep confidences. 4. Be able to deal with constant interruptions. 5. Have the ability to work with many personalities simultaneously. 6. Be able to remember the preferences and needs of staff.

Note: Attach a job description of this position to this job analysis.

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Instructions for Completing the Summary Rating Form

Now that you have analyzed a job, use the attached Summary Rating Form to rate the skill levels required for each task. To complete this form, you will need to use the levels of proficiencies, which are described on a scale of 1 to 5. Use this scale for all ratings in a skill category.

On the job analysis you completed, your C[3] company representative should have written the tasks on the Summary Rating Form. Be sure these tasks are filled in on the form before you begin rating.

The first five boxes on this form are task-specific. Consider one task at a time, and rate this task on each of the eight skill categories before moving on to the next box. As you rate skill levels for this task, concentrate on the specific requirements for successfully performing this task only. Complete the rating for each of the tasks you identified on your Job Analysis Form.

The sixth box asks you to rate the overall job. Consider the highest level of skill needed to perform any of the tasks/responsibilities of the job for each category when rating the overall job.

The final box requests comments on two questions related to the job you are rating. Once you complete this form, return it to your company representative.

Summary Rating Form

Company/Organization: EWISD/Research Department

Person(s) completing form: Doris Baird, Louis Ellison, Sheila Hicks, Nancy Jarratt

Job/Title: secretary

Position of person(s) completing form: secretary

Instructions: Circle the number representing the skill level required for each task identified for this job. Use the levels of proficiencies as a guide

Task 1: Taking and handling telephone calls.

		Rudimentary	Basic	Intermediate	Adept	Advanced
A. Reading		1	(2)	3	4	5
B. Mathematics	N/A	1	2	3	4	5
C. Writing		1	2	3	4	5
D. Speaking and Listening		1	(2)	3	4	5
E. Computer Literacy	N/A	1	2	3	4	5
F. Reasoning and Problem Solving		1	2	(3)		5
G. Originality and Creativity		1	(2)	3	4	5
		Low Impact				High Impact
H. Impact of Errors		1	2	3	4	5

Task 2: Using word processing to produce reports, memos, charts, and other documents.

	Rudimentary	Basic	Intermediate	Adept	Advanced
A. Reading	1	2	3	(4)	5
B. Mathematics	1	2	3	4	5
C. Writing	1	2	3	4	5
D. Speaking and Listening	1	2	(3)	4	5
E. Computer Literacy	1	2	(3)	4	5
F. Reasoning and Problem Solving	1	2	(3)	4	5
G. Originality and Creativity	1	2	(3)	4	5
	Low Impact				High Impact
H. Impact of Errors	1	(2)	3	4	5

Task 3: Making travel arrangements.

	Rudimentary	Basic	Intermediate	Adept	Advanced
A. Reading	1	(2)	3	4	5
B. Mathematics	1	(2)	3	4	5
C. Writing	1	(2)	3	4	5
D. Speaking and Listening	1	2	(3)	4	5
E. Computer Literacy	1	(2)	3	4	5
F. Reasoning and Problem Solving	1	2	(3)	4	5
G. Originality and Creativity	1	(2)	3	4	5
	Low Impact				High Impact
H. Impact of Errors	1	2	(3)	4	5

Task 4: Facilitating presentations.

	Rudimentary	Basic	Intermediate	Adept	Advanced
A. Reading	1	2	(3)		5
B. Mathematics	1	(2)	3	4	5
C. Writing	1	2	(3)	4	5
D. Speaking and Listening	1	2	(3)	4	5
E. Computer Literacy	1	(2)	3	4	5
F. Reasoning and Problem Solving	1	2	(3)	4	5
G. Originality and Creativity	1	2	(3)	4	5
	Low Impact				High Impact
H. Impact of Errors	1	2	(3)	4	5

Task 5: Keeping everything running smoothly.

	Rudimentary	Basic	Intermediate	Adept	Advanced
A. Reading	1	2	3	(4)	5
B. Mathematics	1	(2)	3	4	5
C. Writing	1	2	(3)	4	5
D. Speaking and Listening	1	2	(3)	4	5
E. Computer Literacy	1	2	(3)	4	5
F. Reasoning and Problem Solving	1	2	(3)	4	5
G. Originality and Creativity	1	(2)	3	4	5
	Low Impact				High Impact
H. Impact of Errors	1	2	(3)	4	5

Overall Job Rating:

	Rudimentary	Basic	Intermediate	Adept	Advanced
A. Reading	1	2	3	(4)	5
B. Mathematics	1	(2)	3	4	5
C. Writing	1	2	(3)	4	5
D. Speaking and Listening	1	2	(3)	4	5
E. Computer Literacy	1	2	(3)	4	5
F. Reasoning and Problem Solving	1	2	(3)	4	5
G. Originality and Creativity	1	2	(3)	4	5
	Low Impact				High Impact
H. Impact of Errors	1	2	(3)	4	5

How has this job changed during the past few years?

The way in which work is produced has streamlined the secretary's job and work flow. Everything is much more efficient, and the demands and decision making are much greater. We must be able to think and decide on the best course of action.

How do you expect this job to change in the next few years?

Due to technology (e.g., computers, word processing, desktop publishing, etc.) the secretary's position has changed dramatically. We must constantly upgrade our skills just to keep up.

Thanks

Levels of Proficiencies

Use with the Summary Rating Form to determine the skill level of each task and the overall job rating.

A. Reading

1	2	3	4	5
Rudimentary	*Basic*	*Intermediate*	*Adept*	*Advanced*
Able to carry out simple, discrete reading tasks (e.g., read safety rules, simple directions, want ads, work orders, etc.)	Able to understand specific or sequentially related information (e.g., obtain information from a directory, understand product labels, take written tests, read shop manuals and newspapers, etc.)	Able to search for specific information and interrelated ideas; able to understand main theme or point and make generalizations (e.g., proofreading to delete errors, etc.)	Able to find, understand, summarize, and explain relatively complicated information and to understand cause-and-effect relationships (e.g., interpret school policy, procedures, and rules, interpret and learn from scientific or technical journals, etc.)	Able to evaluate symbolism, multiple meanings, and subtle influences in written material (e.g., interpret classic literature, political writing, etc.)

B. Mathematics

1	2	3	4	5
Rudimentary	*Basic*	*Intermediate*	*Adept*	*Advanced*
Able to perform simple addition and subtraction, multiplication and division (e.g., inventory number of items in stock, weigh produce and calculate prices, total a bill for services, etc.)	Able to use basic math skills to solve two-step problems (e.g., make cost estimates for a construction project, etc.)	Able to use algebra and geometry concepts to solve practical problems (e.g., calculate the number of yards of material needed for a pattern, calculate arrival times in transportation, etc.)	Able to use more advanced math such as calculus, probability and statistics, and differential equations to solve design problems (e.g., design an electric circuit, project growth patterns in a geographic area, etc.)	Able to create mathematical models of a process, derive new theorems or methods of solutions (e.g., derive and solve partial differential equations for a refining process, etc.)

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C. Writing

1	2	3	4	5
Rudimentary	*Basic*	*Intermediate*	*Adept*	*Advanced*
Able to copy serial or model numbers, label materials, fill out a time card	Able to write standard English sentences (e.g., complete application for employment, record telephone messages, etc.)	Able to write to inform and express ideas accurately with correct spelling, |quoting,?| and phrasing (e.g., to construct letters and reports, write a business letter to relate actions taken at a meeting, etc.)	Able to write reports, studies, documents, etc., able to write to convince (e.g., write a report recommending a change in policy, etc.)	Able write publishable material (e.g., journal articles, books, novels, etc.)

D. Speaking and Listening

1	2	3	4	5
Rudimentary	*Basic*	*Intermediate*	*Adept*	*Advanced*
Able to answer and ask questions and follow two or three sequential instructions (e.g., ask an instructor for directions, repeat a message, answer simple oral exam questions, etc.)	Able to verbalize one's understanding of instructions, ask questions for clarification, demonstrate appropriate action (e.g., obtain and give telephone information; order supplies, parts, materials, etc.)	Able to organize and express ideas, directions, and data in a logical sequence (e.g., describe how something works, explain to someone else how to perform a task, etc.)	Able to influence or to sell and identify and comprehend the main and subordinate ideas in discussions (e.g., express an idea to improve a process, justify an investment to management, persuade others in favor of a product, etc.)	Able to conceive and develop ideas about a topic for the purpose of speaking to a group, choose and organize related ideas, and present them in a compelling manner

E. Computer Literacy

1	2	3	4	5
Rudimentary	*Basic*	*Intermediate*	*Adept*	*Advanced*
Able to understand how a computer works and common computer terminology (e.g., DOS, RAM, keyboard functions, etc.)	Able to perform an application (e.g., knowledge of simple software package, etc.)	Able to solve problems using multiple software packages (e.g., word processing, spreadsheet, database, desktop publishing, etc.)	Able to write a program, create new functions	Able to integrate programs to develop complete software systems, develop hardware, etc.

F. Reasoning and Problem Solving

1	2	3	4	5
Rudimentary	*Basic*	*Intermediate*	*Adept*	*Advanced*
Able to understand and implement a given procedure (e.g., inspect manufactured items for certain qualities and accept or reject, etc.)	Able to select the best solution from clear alternatives after interpreting data and information (e.g., determine whether to use fax, express service, or regular mail to transmit information, etc.)	Able to identify and express problems, develop solutions from alternative methods and procedures (e.g., increase output on assembly line, etc.)	Able to abstract, generalize, develop concepts, understand cause-and-effect relationships when multiple variables affect the result (e.g., develop investment strategy for investing in stocks, bonds, money market, etc., based on conditions and trends in the economy, etc.)	Able to develop unique solutions to multivariable and multiple outcome problems (e.g., develop new surgical procedure such as transplant surgery, etc.)

G. Originality and Creativity

1	2	3	4	5
Rudimentary	*Basic*	*Intermediate*	*Adept*	*Advanced*
Able to performs tasks or other activities that do not deviate from procedures	Able to apply original thinking to solve problems, devise or modify processes to solve specific problems	Able to refine concepts or theories discovered or developed by others	Able to create new products or procedures, validates concepts and theories	Able to create original concepts or theories that advance knowledge in technical or professional field and that can be used to develop new products or expand business

H. Impact of Errors

In completing this section:

- *Consider the normal impact of errors, rather than the extreme, rare, or improbable impact.*
- *Do not consider the impact of purposeful neglect or intentional disregard for established procedures or practices.*
- *Consider the likelihood that the error would be caught through other levels of review.*

1	2	3	4	5
Low Impact				*High Impact*
Decisions and actions of such a routine or limited nature that they have virtually no impact on the overall work of the unit if such decisions or actions are not carried out satisfactorily	Decisions have a limited impact on the quality or timeliness of the work or on a specific unit; impact limited to immediate coworkers	Important actions that are clearly related to and affect the objectives within a specific work unit or area; impact limited to specific work unit or area	Decisions have significant impact, but primarily in one major area of the company; decisions do not affect the entire company	Failure to accomplish important goals or objectives, resulting in significant negative impact on the success of the entire organization

This process assumes that the jobs held by most summer participants are not special projects such as the examples presented in the Brandeis Field Kit. In the Field Kit, participants learn SCANS skills as they design their own work activities under the guidance of a worksite facilitator.

The concept of letting participants plan and design their approach to work is important because it exercises the SCANS competencies: resources, interpersonal, information, systems, and technology. In addition, this concept does not require a special project for learning to occur. Participants can learn these skills in the most mundane work.

For example, a project may entail removing chewing gum from under school desks. An analysis of this project calls for determining how a considerable number of desks can be restored to their original condition given the time and personnel available.

Participants can take responsibility for achieving the objective and be permitted to determine how the task should be handled. This would require planning (resources), working as a team (interpersonal), gathering and analyzing information (information), applying a systematic approach to the work (systems), and selecting the best tools (technology). Our point is that all jobs have the potential for teaching SCANS skills.

Another factor to consider when performing a job analysis is the length of time required to complete a project. Students in summer programs typically have only 6 to 9 weeks of worksite experience. A project that requires lengthy planning and many resources may take longer to complete, which means that students would not be able to work at the activity long enough to uncover the SCANS foundation skills and competencies that are the basis of the activity.

Identifying in advance the SCANS-related competencies and foundation skills for each job also makes the assessment process clearer and easier to manage in a project that must operate within a tight time frame. This enables the worksite to develop targeted curriculum exercises that ensure that SCANS skills are an integral and explicit part of learning. Having this information in advance does not preclude students from designing their own processes for achieving identified learning objectives.

Preparing Curricula Based on Results of the Job Analyses

Because all learning and skill-building takes place at the worksite, the diversity among worksites means that there is no "off-the-shelf" curriculum. Therefore, worksite personnel must be trained to develop their own curricula and instructional tools to provide students with learning-rich work projects that correspond to the needs of their particular workplace.

After the job analysis is completed, the employing organization or an external technical assistance advisor should design a curriculum. The function of the curriculum is to organize work activities into coherent, competency-based learning experiences that help students achieve learning objectives and that meet an organization's work goals.

The curriculum exercises must include the four elements of a work-based strategy and must accomplish the following:

- Explicitly demonstrate SCANS competencies and foundation skills
- Provide active learning experiences
- Empower participants
- Demonstrate the principles of learning in context

The purpose of designing and developing a responsive curriculum is to make it easier for worksite personnel who are not used to teaching to create challenging work opportunities for youth in summer enrichment programs. A curriculum is simply a method for transforming work activities into valid learning opportunities that take into account the pressures and conditions found on the job.

The process begins with identifying substantive job requirements and intangible elements that affect the job. These influence the design of performance objectives. These objectives, in turn, form the basis for creating an assessment process that measures achievement levels. The assessment process also includes development of record-keeping instruments to provide feedback on the success of each learning strategy—success from the perspectives of the students and the worksites. To ensure "buy-in" from staff, the worksite learning supervisor and staff who will be working with the youth should participate actively in curriculum development.

Having identified the SCANS competencies and foundation skills through job analyses, you also must consider other features of a quality training program.

Using Competency-Based Instruction

Most curricula are developed using a competency-based formula. Competency-based instruction is a systematic way of organizing learning so that each set of new skills to be learned are progressively more difficult than skills learned previously. A participant in a competency-based program must demonstrate competency in lower level skills before being exposed to the next more difficult set of skills. For instance, summer participants would be taught how to hammer a nail before being taught how to join two pieces of wood together with nails.

Competency-based instruction is based on common sense. Teach the easy stuff, and build on the mastery of the basics to move students to progressively difficult tasks. Your worksite staff are probably doing this already.

Competency-based instruction means that students will move through the hierarchy of tasks at different speeds. This is to be expected. When many participants work as a team, the more able members of the group help teach and reinforce the learning of the less able or slower learners.

In addition, learning rates also vary as a function of the type of task. Some students who demonstrate quick mastery of written instructions may be slower at some manual tasks. Some students will be adept at working with equipment, whereas others will be clumsy. These variances enrich the learning experience for the whole group and therefore should be considered advantages, not disadvantages.

Remember, competency-based learning tasks are based on the following three assumptions:

- The specific behavior needed for successful job performance can be learned
- Once successful performance has been demonstrated, students will be able to move on to the next level of difficulty
- The knowledge, skills, and attitudes acquired by the student can be measured

Using Functional Context Learning

A concept compatible with a competency-based program is functional context learning. Functional context learning uses the concepts of competency-based teaching but adds the following steps to ensure that learning outcomes mirror the needs of both the individuals and workplace. Functional context learning does the following:

- Integrates instruction in basic workplace skills into job-related training so that students can more readily transfer work-related skills to specific jobs
- Prepares course objectives by first analyzing the knowledge and skill demands of the job
- Makes every effort to use the same contexts, materials, tasks, and procedures of the job

For example, a workplace curriculum that uses functional context learning will teach problem-solving to participants using materials and procedures from their jobs. Participants, therefore, build an understanding of how to solve problems that is based on a familiar and usable context and see the immediate practical value of what they are learning. The more the curriculum allows participants to see that gaining proficiency in SCANS foundation skills is integral to successfully carrying out every job task, the greater the likelihood that training will pay off in improved job performance and knowledge transfer.

The major point to keep in mind when designing a functional context learning program is that the human mind classifies and retains information on the basis of the information's perceived importance. New information related to the job will be given a higher priority

than information that has no recognizable connection to anything deemed important by the student.

Another learning principle to keep in mind is the role played by repetition and practice in learning. The more a learner can practice a new skill (e.g., calculating the perimeter of a rectangle), the longer the learning will be retained. When young students have opportunities to apply such academic skills as math, reading comprehension, and writing on the job, the more these skills will become integrated into their permanent knowledge base.

Determining Performance Objectives

Performance objectives describe the outcome of competency you want participants to exhibit. Performance objectives are results-oriented rather than process-oriented. The goals of a particular learning activity, defined in terms of performance outcomes, can be demonstrated by changes in knowledge, attitude, and behavior.

Performance objectives must be written so that they demonstrate a student's "ability to do." They must also demonstrate the circumstances under which a student will be expected to perform the activity and the standard to which the activity must be performed.

The following examples demonstrate performance objectives:

Changing a Tire

Given a car with a flat tire, a jack, a spare tire, and a lug wrench (condition), change the flat tire (performance) according to the manufacturer's instructions and specifications in 15 minutes without injuring yourself or damaging the car (standard).

Conducting an Inventory

On the heavily wooded campus of a community college (condition), determine the number of trees and their condition, the number of each kind of tree, what pruning is needed, how many trees are wounded, and what vines must be removed (performance), according to the *Beautification Committee's Manual of Operation.* Completed this task by the last day of May (standard).

When designing performance objectives for summer youth programs, developers of worksite curriculum have two options:

- Create work assignments that identify performance outcomes that demonstrate task-specific knowledge and the underlying SCANS competencies and foundation skills

- Create work assignments that empower students to design their own work processes and that allow them to identify the job-specific skills and

underlying SCANS competencies and foundation skills that are present in the job

Although the Brandeis Field Kit strongly emphasizes empowering students through a guided self-discovery process, at times it is appropriate and even necessary to take a more academic approach. For example, if allowing students to design their own learning tasks prevents a company from achieving its goals, the training supervisor might want to speed up the learning process without eliminating it entirely by making the process more traditional.

Another example of when academic methods are appropriate is in the teaching of activities that present safety hazards. Safety is of primary importance in many industries. Activities that are common to the industry but present safety problems should not be eliminated from the summer learning experience; however, they need to be handled in a more direct way.

Exhibit 3-2 is an example of a competency-based task statement that includes performance and enabling objectives. This example constitutes part of a curriculum that provides guidance in the form of "job sheets" to participants who are working to achieve competency in a particular skill area. The results of each performance assessment will be placed in students' portfolios.

Recording Student Performance

Another task that must be undertaken when the curriculum is developed is to design a way to record a student's progress in learning SCANS skills. This relates to the student's portfolio assessment discussed in the Brandeis Field Kit, Step 7. Ideally, data directly related to training, such as attendance, hours of instruction, pretest results, post-test results, etc., should be included. Records along the lines of competency-based student profiles that track student progress in mastering skills also should be kept.

Participant assessment enables worksite personnel to do the following:

- Measure the achievement levels of participants in terms of how they are progressing in accomplishing their learning objectives
- Determine SCANS skills or learning objectives with which students are having difficulty to provide additional guidance
- Keep informed on the effectiveness of the learning strategy so that corrective action, if needed, can be taken
- Devise procedures for improving course design

Exhibit 3-3 is an example of an Employee Action Plan Worksheet that training supervisors can use to keep track of the progress of individual students.

Exhibit 3-2

Sample Task Statement With Performance Objective

Job: Child Care Aide

Task Statement: Supervise mealtime activities.

Performance Objective: Demonstrate knowledge of the procedures involved in supervising children at mealtime.

- **Conditions:** Room must be calm and quiet; children's toys must be put away; children's hands must be washed and dry; children must appear comfortable at their tables
- **Standards:** Food must be served efficiently and smoothly at regularly scheduled times in a comfortable and relaxed atmosphere and in an organized area. Aide must demonstrate competence in handling children appropriately during mealtime.

Assessment Tool: Observation. Worksite supervisor will observe and assess performance using a performance checklist. Observations will take place three times on three different meal/snack serving occasions while aide supervises the children.

Key Steps to Task Completion

When serving food to children you must

- Help serve food on time and at proper temperature
- Get children involved in serving food
- Serve proper portions

When supervising children at mealtime you must

- Help organize the area for mealtime
- Help children with hand washing
- Establish a comfortable and relaxed atmosphere
- Serve as an example by exhibiting good table manners
- Assist children in wiping up spills
- Encourage children to try new foods

Exhibit 3-3

Employee Action Plan Worksheet

Name:_____ Dept./Section:_____

Overall Objective:_____

Interim Learning Objective	Action To Be Taken	Form of Assessment	Completion Date	Responsible Person

Participants can be taught to keep track of their own progress. Self-assessments have the added value of providing immediate reinforcement, another key factor in adult learning. Participants can be taught to chart their progress along specified dimensions that relate to a SCANS skill. For example, the number of "on-time" days, the time required to perform certain routine tasks, and the number of customer smiles are performance indicators of SCANS skills that can be quantified by participants. The charts for each dimension can be posted or can remain private. Participants chart their progress and know instantly how well they are doing in achieving specific learning objectives. When one objective is accomplished, another, representing a more difficult task, replaces it.

Student self-assessment also gives students some control over the learning process and keeps them focused on the learning objectives. Student receive immediate feedback, and when feedback is not positive, they have no one else to blame.

What we need to keep in mind is that assessment and record keeping are not ends in and of themselves. Their sole purpose is to make it easier for students to know what needs to be learned and to be aware that learning has occurred.

Using the Worksite to Enhance Classroom-Based Strategies

There are many occasions when both the classroom and the worksite must collaborate to create learning-rich activities. The purpose of this section is to provide some tips for facilitating the collaboration between the classroom and the worksite that will integrate work and learning for summer participants.

How Can Worksites be Used to Reinforce Classroom-Based Instruction?

For classroom learning to be relevant to the worksite, there must be ongoing communication between the worksite supervisor and the teacher. It is always easier to have an ongoing dialogue if people have met; therefore, our first suggestion is that you—the change agent—organize meetings between teachers and appropriate worksite personnel at the worksite.

By meeting at the worksite, teachers can obtain a better understanding of the workplace and the personalities of worksite personnel. This should be seen as an opportunity for teachers to become students and to encourage worksite personnel to show teachers how their particular worksite operates.

The teacher should leave these meetings with a firm grasp of the work activities, workplace rules, tools and equipment employed, and work goals and production objectives. In addition, at worksites that have experience with summer participants, teachers and worksite supervisors may want to discuss common learning deficiencies that have been issues for the worksite in the past. Worksites should prepare for these meetings by reviewing the topics to be discussed in advance, making sure that appropriate information and personnel are on hand during the visit.

Keep in mind that the teachers corresponding to participants at any one worksite may vary. This will necessitate bringing several teachers to the worksite to avoid undue disruption of work. Organizing the meetings could present some logistical problems, and you may want to start this process as soon as participant assignments to worksites are known.

These meetings set the stage for teachers and worksite supervisors to pick up a telephone to discuss students' progress. Be sure to encourage this type of ongoing communication by holding teacher-worksite gatherings in an informal, relaxed atmosphere throughout the summer. At these gatherings, you can serve light refreshments and facilitate discussions about contextual learning experiences. It is more important that teachers and worksite personnel think in terms of the new model of integrated work and learning and their shared responsibilities for teaching than it is for them to raise or resolve problems.

Likewise, worksite supervisors and their designated substitutes should be encouraged to both observe a class and teach some work-related activity in a classroom setting. It is also possible to develop lessons in which worksite personnel and teachers work in partnership as coaches during a classroom learning activity.

In the following job situations, teachers have asked three worksite supervisors to provide examples of three work situations that require the same SCANS skill. These are worksites in which students in the class are currently employed part time during the summer. The objective of the exercise is to explicitly demonstrate the transferability of SCANS skills to multiple work environments. The goal is to reinforce the idea that once a skill has been learned, its principles can, with some adjustment, be used in a variety of situations. The SCANS skill that is the focus of these lessons is "Understanding Systems."

Job Situation #1: Child Care Aide

The Romper Room Child Care Center takes care of 20 children who vary in age from 15 months to 5 years. A student summer aide discovers that one child who she regularly takes to the bathroom has bruises on her buttocks every day (identifies a possible problem). The aide realizes that there may be child abuse involved, but she also realizes that child abuse is a very serious accusation with many serious implications to the parents and her employer.

The aide, however, is very concerned about the child's welfare. She looks at the operations manual located in the central office to see what procedures she should follow in this situation. The manual refers her to the director of the child care center rather than her immediate superior (determines who within the organization can best resolve this issue).

Job Situation #2: Medical Aide

The University Medical Center has hired several students for the summer to provide them with a way to make money and to expose them to career possibilities in health-related occupations. These students are moved around in regular tours so that they have an opportunity to experience many aspects of hospital care. They are expected to learn how the organization is structured and why it is structured that way (to understand the system of organization). The students are expected to stay as current as the rest of the hospital staff on issues that affect patients (to understand the organization's goal of excellent patient care). With every change in department, the aides are expected to stay current on which departments handle which specialties and to learn what patient services are offered by resources outside the hospital.

Job Situation #3: Dental Office Aide

One student has obtained a job in a public dental clinic. Her work requires her to understand such office procedures as the order in which patients are called and the responsibilities of different staff members, such as the dental hygienist, dental assistant, and dentist. Her duties are specified by each staff member for the upcoming week and are reviewed at the end of each week by the clinic administrator. Her supervisor insists that she become familiar with and understand the regulations that apply to her assigned duties. These regulations are published by the American Dental Association, the Dental Hygienist Association, and the licensing board.

The teacher can now use these real work situations to plan a lesson on "Understanding Systems." The teacher can lead participants in a discussion that clarifies what constitutes a system in each organization, how such systems affect their work activities, and why systems are needed in organizations. The teacher can facilitate the discussions and provide summaries that can be applied to other participants' worksites.

How Can Worksite Staff Participate in the Portfolio Assessment Process?

The use of portfolios for performance assessment is most popular in school settings.[1] Using worksite personnel in this activity involves careful preparation and training.

The Brandeis Field Kit provides excellent examples of how to prepare and use portfolio assessment. Following is just one example of how worksite supervisors can assist in assessing students.

A teacher asks worksite supervisors to provide an opportunity for students to design a work assignment that allows students to identify how they can use SCANS skills presented in class in a real work setting. The students are asked to write a proposal for completing their work-learning activity. The proposal should include the following:

- The process students will use for achieving goals

[1] Mitchel, Ruth. 1992. *Testing for Learning*, p. 103. New York: The Free Press.

- Which SCANS skills are integral to completing the tasks
- What organizational standards apply
- How students would go about demonstrating their competencies

The worksite supervisor works out an observation schedule to assess the student's performance. These assessments are included in the student's portfolio. The actual performance of the job task is assessed by comparing the performance with the written proposal. The teacher evaluates the quality of the written proposal, and worksite supervisors evaluate how competently the task was carried out, based on what the participant said he/she would do.

This is only one example of how worksite staff can be integrated into the portfolio assessment process. Exhibit 3-3 can be used in conjunction with portfolio assessment to keep track of student classroom progress. It also can be used in conjunction with the portfolio assessment instruments the Brandeis Field Kit provides in its appendices, particularly the SCANS assessment instrument in Appendix C.

We need to keep in mind that it is important to learn not only SCANS skills, but also the job-related knowledge and skills that are company- or industry-specific. The portfolio assessment provides the basis for a youth's first resume. One incentive for youth to become enthusiastic about portfolio assessment is that students will be provided with an attractive resume at the conclusion of the summer—a resume that reflects the SCANS and occupation skills learned that summer.

Chapter 4

Converting Traditional Classrooms Into Contextual Learning Laboratories

Chapter 4. Converting Traditional Classrooms Into Contextual Learning Laboratories

Introduction

One of the three strategies for integrating work and learning mentioned in the Brandeis Field Kit is the classroom-based strategy in which work-related active learning takes place in the classroom. SCANS competencies and foundation skills are taught in a real world or workplace context using the techniques of active learning, competency-based instruction, and participant empowerment or leadership to develop a learning environment that demonstrates the application of basic and higher order skills.

The classic model for a classroom-based strategy calls for the teacher to be responsible for creating this type of learning environment by changing or adapting traditional classroom teaching methods. One of the most difficult organizational changes that you, as change agent, must orchestrate and support is the capacity-building that enables educators to make the transition from traditional instruction of basic academic skills to contextual learning of SCANS skills.

There are many ways in which summer enrichment programs can combine classroom learning with real-world work experiences to convey the importance of SCANS skills. In the section "Transforming the Classrooms," the Brandeis Field Kit provides several scenarios that illustrate what classrooms look like when summer employment situations are used to enrich classroom instruction. In addition, the Field Kit includes an appendix with case studies that describe how various SDAs have accomplished academic enrichment of summer programs.

To complement the material in the Field Kit, this chapter provides some techniques and methods that may be employed by classroom teachers to incorporate the key elements of contextual, active learning in the classroom. The material herein may be used as a guide for teacher orientation or training in conjunction with the Brandeis Field Kit.

The examples and exercises described here represent only a sample of the methods for integrating work-related materials into classroom curricula. Staff attending your workshop need to return to their communities and draw on the knowledge and expertise of their own organizations, curriculum developers, worksite supervisors, and local employers to plan how this summer's program will engage the attention and imagination of the students.

How Do I Help Schools Develop a Capacity for Classroom-Based Enrichment Strategy?

In Chapter 2, we talked about marketing to schools and gaining their support for the changes needed to implement a new approach to teaching youth. If you are ready to begin capacity-building, you have received the endorsement of the school decision makers and are now ready

to meet with the teachers who handle areas where the most significant changes are likely to occur. It may be wise to repeat your presentation and arguments to convince them of the value of the new approach as well. It is important that teachers be committed to the strategy that hinges on their skills and efforts.

We then suggest a training activity that orients teachers to some of the concepts and methods embodied in Step 6 of the Field Kit, Transforming Classrooms: Changing Curriculum and Instruction. You may create your own training materials or you may use some of the illustrations in this guide that focus on critical areas that represent changes from traditional classroom instruction.

As the Field Kit points out, the development of good curricula relies heavily on sufficient advance planning, appropriate staff retraining, and authentic assessment. Whatever the structure of a classroom, all of these elements play an important role in providing summer youth with experiences that will advance them toward the goal of eventually assuming a productive place in the world of work.

Just What Is Integrated Work and Learning?

For the purposes of this guide, integrated work and learning refers to teaching SCANS competencies and foundation skills in the context of the summer job. Contextual learning also can be based on simulations of work or other real-life situations.

The challenge for teachers who are integrating work and learning is to be able to explicitly demonstrate and explain the transferable nature of skills to their students. That is, teachers must connect isolated pieces of knowledge to broader competencies so that students can generalize skills and knowledge to apply them to new situations. For youth enrolled in summer enrichment programs, it is especially important to connect knowledge and skills learning to the workplace so the students can use them in their summer jobs.

For instance, let's assume that a teacher is interested in making sure that students understand the importance of knowing how to solve problems, one of the SCANS competencies. The teacher chooses a simulated exercise that involves working as an aide at a state-operated nursing home. The situation centers around the fact that the daughter of an elderly women who resides there has complained that the aide has not responded quickly enough to her mother's request for assistance. The aide believes she has been as responsive as she is able given the other patients to whom she must attend. The nursing supervisor is called, and she works with the aide, the daughter, and the mother to resolve the situation. She uses the following problem-solving model:

- Become aware of a need (dissatisfied patient and patient's relative)
- Analyze the problem (perceived delay in responding to patient's needs)
- Know the options (work with the patient to determine if this is a pattern, reprimand the aide if this is the case, and discuss the mother's behavior with the daughter and the difficult conditions in a nursing home, etc.)

- Adopt a solution (ask the patient to time the response the next time she has a request, provide some additional training for the aide, keep an eye on the aide to see if she is ignoring the patient's requests, and observe the patient to see if she makes unreasonable demands)

- Implement the solution (review with aide the kind of patient care the nursing home should provide and work with all aides to ensure that similar complaints are kept to a minimum; review with incoming patients and their families how a nursing home operates)

- Integrate the solution into the system (monitor the solution to make sure it works well)

At the conclusion of the learning activity, the teacher needs to take it one step further to show students how the problem-solving model used in this situation can be transferred to almost any kind of problem in any job or industry. This kind of structured learning, or learning in context, takes advantage of a person's previous knowledge and experience to validate familiar processes as they are applied to new problems.

To accomplish this kind of learning, learning objectives need to be developed that coincide with real work environments rather than those that first emphasize learning in the abstract about what will be expected to be applied later. Teaching in context implies that classroom situations will provide students with opportunities to apply knowledge in real-life situations or simulations (e.g., problems or projects related to workplace situations).

How Do I Teach SCANS Skills and Their Roles in a Classroom-Based Strategy for Academic Enrichment?

It is absolutely critical that teachers understand the basis of the SCANS competencies and foundation skills and understand their role in academic enrichment. The following discussion may help you explain to teachers what the competencies and skills are and how they are incorporated in functional context learning.

What are SCANS Skills?

In the workplace, workers do not use only one skill to complete their work; effective performance requires many different skills used in combination with one another. It stands to reason then, that students benefit from working on tasks and problems in classroom settings that challenge their competency in using a range of skills simultaneously. This know-how was identified by SCANS as five competencies and a three-part foundation of skills and qualities needed for solid job performance. These include the following:

Competencies	
Resources	Allocating time, money, materials, space, and staff
Interpersonal Skills	Working on teams, teaching others, serving customers, leading, negotiating, and working well with people from culturally diverse backgrounds
Information	Acquiring and evaluating data, organizing and maintaining files, interpreting and communicating, and using computers to process information
Systems	Understanding social, organizational, and technical systems; monitoring and correcting performance; and designing or improving systems
Technology	Selecting equipment and tools, applying technology to specific tasks, and maintaining and trouble shooting technologies
The Foundation	
Basic Skills	Reading, writing, arithmetic, speaking, and listening
Thinking Skills	Thinking creatively, making decisions, solving problems, seeing things in the mind's eye, knowing how to learn, and reasoning
Personal Qualities	Individual responsibility, self-esteem, sociability, self-management, and integrity

How Do Teachers Teach SCANS Skills?

One of the first questions every teacher asks when looking at this list is "How do we teach these SCANS skills?" The simple answer is to design learning tasks to reflect and reinforce work tasks by including SCANS basic skills and work-related competencies in the same process. In conjunction with this, teachers should structure lessons so that students learn by doing. Academic lessons should support work-related learn-by-doing tasks rather than the reverse.

There are direct ways to integrate SCANS skills into curricula. To accomplish this, however, a teacher must understand how basic the SCANS building blocks are to all job categories. There is a perception that SCANS skills only apply to "high-performance workplaces." Nothing could be further from the truth.

In analyzing jobs to uncover the basic skills required to perform them, as mandated by the SCANS Commission, we find that SCANS skills are crucial to being able to perform even the most basic jobs. The following examples illustrate what schools can do to make this fact come alive for students involved in summer enrichment programs. Following are some examples of how to do this.

Example 1: Understanding Systems

Students who may be working as laboratory aides can become involved in a mathematics class where they learn the dynamics of epidemics—how the number of people infected grows over time. To start, students shake hands with other students, allowing them to become infected with a disease determined in advance. After data on the number of infections has been collected, students work cooperatively to formulate hypotheses and make graphic representations of projected outcomes. After analyzing the information obtained from the graph on growth rates, students use computers to build several different models of epidemics. In this example, systems concepts are made intellectually explicit. Students are actively engaged in thinking about biological phenomenon, and they learn cooperatively from one another.

Example 2: Providing Good Customer Service

Students working in some capacity with hotels for the summer take part in a training exercise to make them more aware of how interpersonal skills affect business. The teacher breaks the students up into groups where they play roles in different situations involving dissatisfied customers, with one person in each group playing a complaining customer and one person playing the hotel manager. At the conclusion of the role playing, each group reports its solutions, and the class asks follow-up questions and evaluates the solutions. Students develop skills in giving and receiving feedback (constructive criticism), and they learn the importance of providing good customer service without diminishing the dignity of the individual employee.

Example 3: Allocating Resources

A classroom is set up to replicate a company that exports a perishable product overseas. The students must make a variety of decisions regarding how to allocate resources to ensure that the product does not go bad, that it arrives in a timely manner, that they do not overbuy or underbuy the product, etc. They also gain expertise in allocating money by using spreadsheets to map the costs associated with establishing a business of this nature.

Example 4: Integrated Exercise

All students in class have jobs in fast-food franchises or restaurants. To give these students an opportunity to learn what goes into a decision to open a restaurant, the teacher prepares an integrated exercise. First, the students must use their math skills to develop information to present to a zoning board to gain approval to build the restaurant. This involves working individually and in groups to conduct a survey to find out what kind of a restaurant people want, placing the information in charts and graphs, making a presentation before a zoning board to gain approval for building the restaurant, using math skills to design the restaurant to maximize the lot size, and calculating the cost of building the restaurant. Finally, each student must make a presentation on why a particular decision was made. Students are scored on five competencies: communications, mathematical reasoning, problem solving, making connections between systems and resources, and using technology.

How Are SCANS Skills Transferred From One Situation to Another?

The teacher has two important activities to carry out: to provide an opportunity for students to gain competency in using SCANS skills in a complementary and interdisciplinary manner and to help students learn to transfer their competency in these skills from one work situation to another.

These activities are made more difficult when students in the class do not work for the same worksite, which is typical of most SDA summer programs. Therefore, we will also describe methods for accommodating a more heterogeneous mix of students. It is important for teachers to know how to develop curricula where the skills learned can be applied to several different work situations.

Following is a two-part exercise that can be used to accomplish this. In Part 1, the teacher presents the class with a simulated work situation in which a problem needs solving. The teacher should identify a simulated work situation different from any in which students in the class currently work. Students will work together in teams to identify and solve the problem and identify the SCANS skills necessary to complete this work-related task.

After each team has completed its assignment, a presenter from each team will briefly discuss the team's conclusions. When all teams have completed their presentations, the class as a whole will develop a list of the SCANS skills it used in solving its problem, plus the problem-solving model it used.

Part 2 of this exercise requires students, working alone, to prepare and present a situation from their own job experiences that require at least some of the same SCANS skills identified in Part 1. Their presentations should describe problems that have arisen during their time on the job and how they would use the problem-solving model presented at the conclusion of Part 1 to solve their problems. The student presentations should do the following:

- Identify the SCANS skills present in the simulated situation
- Identify SCANS skills in the simulated situation that are used in their own jobs
- Explicitly describe the problem-solving model in Part 1
- Explain the generalizability of the problem-solving model in Part 1 and the other identifiable SCANS skills to multiple work situations

From a teaching point of view, this is a perfect vehicle for illustrating "knowledge transfer." In this example, the students come to understand that the SCANS skills used in one work situation may also apply to a different work situation. Specifically, if teachers work with students to help them understand how they can use the same problem-solving model in two different situations, they soon realize that this and other basic work-

related competencies they have learned to identify and use in the simulated problem can be applied in most, if not all, job situations. The recognition that they now have a useful skill that they can use in many situations is empowering to students. It builds self-confidence and makes them more willing to take the initiative in attacking difficult problems as they arise.

Although not an explicit goal of the problem-solving exercise, the need to conduct research and prepare oral assignments provides students with an opportunity to use other SCANS skills. These skills include the following:

- Speaking and listening
- Thinking creatively
- Working in teams
- Making decisions
- Reasoning
- Taking individual responsibility
- Practicing self-management
- Allocating time
- Teaching others
- Acquiring and evaluating data
- Interpreting and communicating
- Using computers to process information (where applicable)

How Do Teachers Create Opportunities for Students to Gain a Firsthand Understanding of the SCANS Workplace-Skill Requirements?

The jobs that students hold during summer employment and after they leave school, one way or another, involve using SCANS skills. Students need to be convinced that SCANS skills are not simply abstractions, but real necessities they must master to gain employment. One method for accomplishing this is to conduct a project in which students find out for themselves what skills are needed on real jobs through interviewing actual job incumbents.

The exercise proposed here and the accompanying materials were adapted from the IndianaPLUS School-to-Work Project, which started in the 1991-92 school year. The IndianaPLUS Project was adapted from the extensive field survey the SCANS

Commission undertook to find out what skills are required for entry-level job applicants to gain and keep employment in the 21st century. The IndianaPLUS model provides students with a hands-on opportunity to assess the skill requirements of jobs in their own community, where they might be employed when they leave school. It also provides an opportunity to practice using many of the SCANS skills.

An additional benefit from this exercise is that it can be adapted and expanded to become a year-round school-based exercise. Furthermore, the requirements of the exercise promote close collaboration between educators and business people.

SCANS Skills Interview Exercise

The working assumption is that students will need to put in at least 80 hours on this project during the summer, enough time to complete at least three interviews, collate the results, make site visits, prepare their reports, and present their results to the class. To accommodate students who have summer jobs, this project can be offered in three forms: full-time, half-time, or intermittently during the summer. At least one interview should be with the company in which a student is working. The other interviews can be in job areas in which individual students think they might like to work.

Students will record their experiences in a variety of ways (written reports, photos, videotape) and will be expected to report their findings to their classmates at the conclusion of the project.

The primary method of research for this project will be interviewing a variety of job incumbents in different job settings. The student will use an "interview protocol" designed to probe beneath the superficialities of a particular job. In many cases other activities will also play a role in acquiring information. These may include but are not limited to briefings and the opportunity to observe work in progress through a process known as "job shadowing." Job shadowing allows a student to follow a job incumbent around to observe what he or she does to carry out work assignments. Following is a suggested organization of the curriculum for carrying out this project.

Step 1: Orientation

Students should take the first two weeks of class time to discuss school-to-work issues, organize into two-person teams for job-site interviews (one person to ask questions, another to take notes), familiarize themselves with the Interview Analysis Form, and role play the interview process. During this time, the teachers, with participation from the students, should schedule job-site interviews.

Step 2: Research

The interviews should take place within weeks 3 and 4. The average number of interviews per student team should be three. Two of the interviews should be with the company in which a student is working; the other interview should be drawn from companies in which the student thinks he/she might like to work when leaving school.

The student who is not working at the company should be the lead interviewer; the other student should be the note taker.

Students will approach each interview armed with detailed instructions on how to conduct the interview session, a job-analysis form to complete, and definitions of job skills. Copies of these interviewing instruments appear in Appendix B. From each major category of skills and competencies, the interviewer selects a skill that the worker has described as critical and has the worker cite a typical task illustrating that skill, trace the steps involved in the task, and describe materials or equipment used in specific steps. Each interview should take between 60 and 90 minutes. (Note: The handouts that are included in this Change Agent Guide are simply suggestions. They have been used successfully with high school students in conducting a similar project. You are, of course, free to change them to fit your needs.)

Step 3: Creative Development

During this time students can discuss and assimilate what they have learned in the research phase and go back for follow-up interviewing or job shadowing. Above all, students should use this time for creative decisions on how they will communicate what they have learned. Working as two-person teams, they can produce a product that illustrates their results, such as a videotape, which they can shoot during follow-up interviewing, not during the initial interviews, or such written materials as survey results compiled using enhanced computer programs, poems, dramas, crossword puzzles, etc. The idea is to make the presentation something that will hold the interest of their classmates.

Step 4: Communication

This is the effort that student teams make to communicate their results to their peers. If more than one class is involved or a partnership has been established with other schools, perhaps a districtwide assembly could be held at the beginning of the school year, with a selection of the presentations made to middle schoolers who might be interested in what skills are required by certain job categories.

The thrust of this project is to empower the students to become change agents in their own lives—to think more seriously about what skills they need to be employable.

How Do Teachers Develop Partnerships With Worksites?

An important aspect of effectively transforming classrooms involves creating a cooperative relationship with local worksite supervisors. There are several distinct approaches that will help accomplish this. We have described three, which follow:

Helping to Develop Curricula

The key to developing lessons relevant to multiple workplaces is to encourage employers to become involved in the curriculum development process. To do this, several months before the start-up of summer programs the SDA summer program manager should convene a Curriculum Development Advisory Council (CDAC) composed of curriculum developers, summer youth instructors, and representatives from employers whose organizations have been selected as summer youth job sites.

During the process of developing work-relevant curricula, employers should be invited and strongly encouraged to observe classrooms firsthand to better understand the obstacles that make it difficult to create nontraditional, work-oriented learning environments. Teachers, in turn, need to visit and intensively study worksites where students will be expected to perform so they can understand what basic and work-related skills students must have to succeed in the workplace.

Other activities of a similar nature that will encourage employers' initial and ongoing involvement include the following:

- Ensuring that worksite personnel understand the purpose and reasons for their involvement; otherwise they will be reluctant to contribute their time to the effort

- Developing and presenting information to worksite staff that demonstrates how participation in classroom enrichment efforts is in their own best interests

- Utilizing intermediary organizations such as the Chamber of Commerce to play a critical role in generating employer involvement

Encouraging Dialogue Between Employers and Teachers

Teachers need to maintain regular telephone contact with worksite supervisors to make sure that problems among their students are being addressed and to find out how students are progressing. If at all possible, teachers should visit student worksites to gain a firsthand knowledge of what students are experiencing and to establish face-to-face relationships with worksite supervisors.

Conversely, teachers should encourage employers to call and discuss learning problems and knowledge gaps among their summer youth employees. By feeding this information to the teachers, lessons can be devised that will address these problems. The following scenarios are examples of the kind of classroom lessons that can be developed to supplement work experience and help solve some on-the-job problems that might arise.

Example 1: Using Mathematical Concepts

A supervisor at a State construction site is using a student to assist in the installation of plumbing for a solar domestic water heater. He asked the student to use a protractor and a compass to get an altitude and an azimuth reading to determine what months and what times of the day the solar collectors will be shaded. The student does not have any idea of what a protractor is or how to use a compass.

With this information from the worksite supervisor, the teacher devises a series of problems that use a protractor and a compass in determining how to measure angles. The teacher discusses what kind of occupations might make use of these kinds of tools. When the student goes back to the construction site, he is now confident of his ability to use these tools.

Example 2: Reading

One of the students has a job as shipping and receiving clerk at a government warehouse. The student's supervisor discovers that the student makes mistakes in the bills of lading when she checks in merchandise. The supervisor isn't sure what the problem is, so he calls the student's teacher and explains the situation as best he can.

The teacher checks the reading assessment tests for this student and finds that she is reading at a 10th-grade level; therefore, her comprehension is probably not the problem. However, the teacher knows that reading for doing is different from reading for learning. The teacher asks the supervisor for copies of old bills of lading and also goes to other companies in the area that uses such forms. She also knows that the school will be receiving supplies and textbooks during the next few days. First the teacher has the students in the class go over the sample bills of lading to point out what kind of information they contain and what clerks who unload merchandise must look for, such as verification of the delivery of a correct number of products, determining whether the bill has been prepaid in order to route it to the proper department, errors in the bill, etc. After this classroom lesson, the teacher has students work with school personnel accepting delivery of the merchandise in order for students to gain practical experience in what she has just taught.

A week later, the teacher receives a call from the supervisor about his summer employee. Not only has the problem been solved, but this student has suggested some ways to make the entire verification process more efficient for the company.

Example 3: Participates as a Member of a Team

Several students in a class have been hired to work in a child-care center for the summer. When the teacher calls to find out how her students are doing, the center supervisor indicates that the girls seem to have some difficulty working with the other staff and do not understand why they have to do the menial tasks as well as the more rewarding ones.

On Monday the teacher asks each student to make arrangements to bring in a baby on Thursday. She then asks students to form teams and decide how they would set up a

child-care center, determining what tasks will need to be done and how work should be allocated. She asks the students who are working in child-care centers to act as advisors to the groups to make sure that all tasks are covered. When each team has developed its proposal to handle the children, the teacher asks for a reporter from each group to report on how they will set up their center. The teacher is interested in eliciting from each group how the less enjoyable tasks were assigned and what would happen to the operation of the child-care center if these tasks were not included in the planning to ensure that they were done each day.

On Thursday, when the students bring the children in, they have set up the classroom to simulate a child-care center and, under the teacher's guidance, they go about running the class as if it were a child-care center. On Friday the teacher asks the students to critique their operation of the classroom child-care center and discuss the advantages of working as a team in order to share the burdens of the less desirable jobs. The students who are working in real child-care centers show more enthusiasm for their jobs and are more willing to do the less desirable jobs now that they understand why they are necessary.

Mentoring Between Employers and Summer Youth

Employer involvement whereby worksite staff create participant/staff work teams can have a positive impact on high school youth. The objective is to create side-by-side task-based relationships between youth and their worksite supervisors that allow them to share day-to-day problem solving around meaningful work. Mentoring in this context provides the youth with a role model for learning SCANS competencies and foundation skills from a credible coach, the job supervisor.

Mentoring also can occur outside the framework of the worksite, using formal mentoring programs. These are more difficult to set up and maintain. In formal mentoring programs, students and potential mentors are provided opportunities to see if their personalities and job interests match. A formal mentoring program requires some training for both mentors and mentees.

There are many mentoring roles a mentor can play. A few of these are listed in Exhibit 4-1. This list illustrates only mentoring relationships that occur between mentors selected from outside the organization where the student is employed for the summer. A discussion of an in-company mentoring program is discussed in Chapter 4. Information on mentoring contained in this guide was adapted from materials developed by TMI—The Monitoring Institute, Inc., West Vancouver, B.C., Canada.

Exhibit 4-1

Key Mentoring Roles Between Employers and Students Who Are Not Working Together

Role Model	Mentor represents the business world and explains the formal and informal ways business organizations often work
Reflective Practitioner	Mentee learns self-improvement by practicing self-assessment that works on the job
Counselor	Shares insights, practical know-how, advice, and wisdom
Sounding Board	Listens to and clarifies protege's ideas and plan of action
Talent Stretcher	Challenges mentee to take risks, and suggests new directions for development
Motivator	When mentor thinks mentee is ready, pushes mentee to take action
Encourager	Supports and facilitates mentee's self-motivation
Praiser	Compliments mentee's actions/efforts and praises mentee in front of others
Prescriber	Provides mentees with specific direction, strategies, and structure when needed
Validator	Supports and facilitates mentee's long-range goals

These are just a few of the roles that a mentor can assume during a mentoring relationship. Schools should look for mentoring volunteers first among persons who express an interest and feel comfortable in taking on the role of mentor. Many companies provide release time for their employees to participate in this type of activity. Use the PIC as a primary resource, followed by community-based business groups such as Chambers of Commerce.

Exhibits 4-2 and 4-3 are examples of tools that provide an opportunity for each partner in the mentoring relationship to come to a realistic understanding regarding mutual expectations. Teachers should always be available to participants as both sounding boards and problem solvers.

How Do Teachers Strengthen Classroom-Workplace Linkages?

Here are some simple rules of thumb you can pass on to help teachers make the student's classroom experiences seem more relevant to the workplace:

- Emphasize demonstrations, performance modeling, and supervisor coaching as primary means of teaching
- Test students in ways that measure such job-specific criteria as performance quality, production rates, safety, customer satisfaction, and manufacturer's specifications (see Chapter 3)
- Encourage students to work in teams to complete learning assignments
- Express lesson assignments as "work orders" reflecting those used in industry
- Emphasize quality and productivity by applying reasonable pressure on students to perform tasks correctly and on time, as determined by industry standards
- Use actual worksite materials (manuals, installation instructions, safety materials, forms, tools, etc.) as part of routine lesson content
- Issue supplies, tools, and equipment in a way similar to how they are issued at a worksite; use a work-based requisition process for issuing materials
- For classes that are set up for a single industry, organize the training area like the worksite; explicitly discuss the work climate
- Use real products and customer relations principles whenever possible
- Sustain instruction patterns between teachers and students that mimic those of the worksite in terms of formality, expectation, discipline, and responsibilities

Directions: Each partner should fill out a questionnaire. Write down answers to all the questions that apply to you. Some questions will need to be answered by both of you. These have been marked with an asterisk (*). After both of you have finished filling out your questionnaire, face each other and discuss your answers.

A. Discuss Expectations You Both Have

1. Do you understand the expectations for working together?

   - ☐ Yes
   - ☐ No

2. What major expectations do you have about this mentoring program and your participation in it?

3. *Who will initiate meetings and interactions?

4. *If meetings do not occur as expected, what will you do?

5. What is your focus? (you can choose both)

   - ☐ Professional development
   - ☐ Getting to know each other personally

6. Have you agreed to maintain confidentiality?

   - ☐ Yes
   - ☐ No

B. Discuss Concerns About Potential Problems

1. Are you concerned about not having enough time together regularly?

   - ☐ Yes
   - ☐ No

   If this is a problem, how will you resolve it?

2. If you feel mismatched, how will you handle this?

3. Are you concerned about any cross-racial, cross-gender or cross-cultural issues?

   ☐ Yes
   ☐ No

   If yes, describe them.

C. Major Goals To Be Achieved Through This Relationship

1. Mentee's major goals:

2. Mentor's major goals:

3. What will you do if mentee does not ask for needed help?

4. What will you do if mentor cannot provide needed help?

5. What will you do if mentor's major goals are not met?

6. What will you do if mentee's major goals are not met?

7. How will you determine whether mentee's goals have been met?

8. How will you determine whether mentor's goals have been met?

Exhibit 4-3

Action Plan

Mentee _____ Phone _____
Mentor _____ Phone _____

Directions:

1. Agree on major goal. Write it in box.
2. **Agree on** and then write down logically sequenced experiences, activities, etc., needed to accomplish goal.

Major Goal To Be Accomplished:

Date	Agreed on Learning Experiences, Activities, Coaching, Resources Needed to Accomplish Goal

Chapter 5

Applying Program Models for Summer Enrichment

Chapter 5. Applying Program Models for Summer Enrichment

Introduction

DOL has been quite vocal about the need for SDAs to adopt program approaches and designs that better address the goals of summer youth employment programs. Following are these goals as stated in the JTPA:

- To enhance the basic educational skills of youth
- To encourage school completion or enrollment in supplementary or alternative school programs
- To provide eligible youth with exposure to the world of work
- To enhance the citizenship skills of youth (Section 251)

The JTPA also mandates objective assessments of summer youth employment programs to facilitate a service strategy that identifies objectives and appropriate services.

To achieve these purposes, the research and development work described in the Brandeis Field Kit provides a strong argument for approaches that incorporate contextual learning or integrate work with learning of SCANS competencies and foundation skills. DOL endorses the Brandeis recommendations and offers a range of technical support to help SDAs make the transition from traditional summer programs of work to programs enriched by basic education and higher order work-related skills.

This chapter of the *Change Agent Guide* will help you incorporate in your summer program one or more of the following three strategies for academic enrichment set out in the Brandeis Field Kit:

- Work-based learning, in which the worksite is the locus of "active" learning that incorporates the SCANS competencies and foundation skills
- Classroom learning, in which the classroom is where SCANS competencies and foundation skills are taught in the context of work and other real-life situations
- Enriched summer jobs, in which the learning potential of a traditional summer job is extended by complementary activities that occur on or off the worksite

There are four key elements for implementing these strategies that must be reflected in the summer program design. First, the objective of academic enrichment is to teach as many of the SCANS skills as possible; therefore, the SCANS skills drive program design. Second, the approach to academic enrichment applies active learning principles wherein participants learn by

doing. Third, learning occurs in the context of a relevant work or real-life situation. Fourth, participants are given control of the learning situation to increase their motivation, enhance their self-esteem, and develop their capacity for leadership and the work ethic.

The program models that we describe in this chapter reflect different approaches for incorporating these four key elements. Your choice of models will depend on a number of factors, not the least of which is the readiness for change reflected by the schools, worksites, and other organizations that are part of the model.

We will begin with a discussion of the following factors related to organizational change that will affect your choice of models:

- Worksites' willingness to contribute the resources needed to implement any of the three strategies
- Schools' willingness to contribute resources needed to implement any of the strategies
- Cost of staff and training related to capacity-building needed for any of the strategies

We will follow this discussion by describing five models, their cost implications, staff requirements, and advantages and disadvantages. You can propose these five models as options your work group can use for implementing a summer enrichment strategy. Your work group may ask for clarification or pose other options.

This chapter will help you choose a model that is most feasible to implement, given the climate for change and resources available.

How Do I Design a Summer Enrichment Program For My SDA?

Cost and the commitment and resources of worksites and schools are critical considerations when designing a summer enrichment program. The synergism of these factors drives the choice of models.

For example, let's assume that there is a continuum for each factor that extends from high to low, such as the ones displayed in Exhibit 5-1.

When all continua are at the low end, we have the traditional summer program. It requires neither commitment to change nor academic enrichment via integrated work and learning from either the schools or worksites, and it is the least expensive model to operate. It is depicted in Exhibit 5-2.

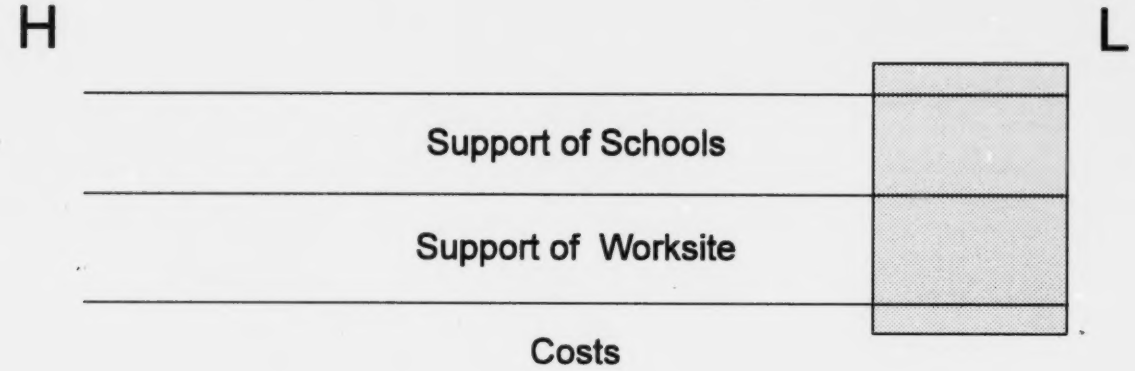
Exhibit 5-1

Factors for Summer Enrichment Program Design

H		L
	Support of Schools	
	Support of Worksite	
	Costs	

Exhibit 5-2

Traditional Summer Programs



When all three continua are at the high end, we have an example of a project in which the school dispatches teachers to the worksite to serve as crew leaders in a classic work-based learning strategy. This project, depicted in Exhibit 5-3, exemplifies a high level of commitment from both schools and worksites and is the most expensive to operate.

Within the range of these extremes, there are a number of possible options, each representing varying levels of cost and commitment to change on the part of the schools and worksites. To select a model or design your own, you need to first assess these three factors that determine the parameters for your model. If you are not happy with your options for a choice of model, here is what can be done about it.

First, consider investing in capacity-building to promote readiness for change on the part of schools and worksites and their staff. This will move you closer to the day when the desired model is within reach. Second, link the summer program to your Title IIC year-round program. By pooling resources to focus on a core group of participants, you will have a better chance of developing the integrated work and learning strategy that can be replicated on a larger scale during the summer. Third, establish a year-long summer staff of planners or program development specialists. This will give you the lead time needed to plan future summer programs more effectively.

All of these suggestions take into account the fact that managing academic enrichment for a short-term summer program is very difficult. You can greatly increase your likelihood for success if you extend the summer program into a meaningful component of a year-round youth initiative.

What Are My Choices of Models?

You have numerous choices of models; however, we will discuss only five. Don't limit yourself to these; there are other ways of applying the three strategies of academic enrichment within the parameters discussed previously.

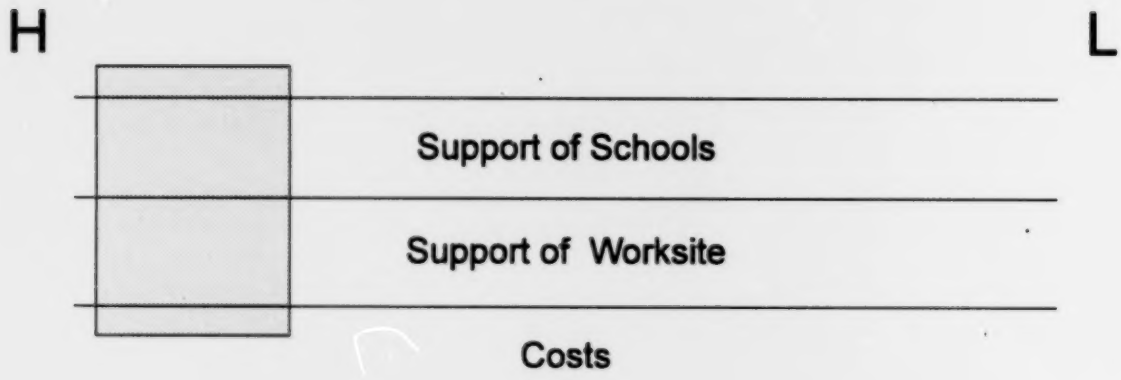
Facilitator Model

Overview

In the facilitator model, a facilitator retained by the SDA or the program operator designated by the SDA is responsible for integrating work and classroom experience. The facilitator works with a small caseload of summer participants at a limited number of worksites. At each worksite, the facilitator confers with the worksite supervisor, analyzes the job, and determines the SCANS skills and competencies need to do the job. The facilitator also helps the teacher organize lesson plans that promote the learning potential of worksite tasks. The facilitator divides his/her time between the worksite and the classroom, facilitating an active learning process that incorporates the four JTPA goals of summer youth employment programs.

Exhibit 5-3

Classic Work-Based Strategy



The burden for enrichment rests clearly with the summer program staff person rather than with the teacher or worksite supervisor. The facilitator moves among worksites and their corresponding classrooms, augmenting the talent and skills of the teachers and worksite supervisors to combine the work and learning components of a traditional summer program.

Implications for Organizational Change

One of the advantages of the facilitator model is that it does not rely on a high level of commitment or change from either the worksites or the schools. Schools and worksites need only give the facilitator access to their facilities and be willing to cooperate with him/her.

In addition, using the facilitator model is a good way to generate more readiness for change. Engaging in merely peripheral roles allows teachers and worksite supervisors to observe the impact of new methods at close range. The familiarity and positive associations gained from working with facilitators should make teachers and worksite supervisors more willing to take on a leadership role in next year's summer enrichment programs.

Even in organizational climates in which schools or worksites have made only a limited buy-in of the concept of summer enrichment, the facilitator model allows SDAs to move in a positive direction by relying on their own staff to facilitate learning.

Risk Factors

The facilitator model gives the SDA maximum control over the summer enrichment program, which is particularly important if the idea is still new to most worksites and schools.

Preparation

Although worksite supervisors and teachers need to be oriented to the concepts and goals of the facilitator model of summer enrichment, they do not need extensive training. The only people who require intensive training are the SDA facilitators, not the worksite staff members and teachers. This reduces the time required for and logistics of training, and when summer staff are recycled every year, SDAs receive a bigger return on their training investment than if training is targeted to non-SDA personnel.

The chief disadvantage of this model is that participants' worksite and classroom caseloads must be coordinated to create a feasible schedule for facilitators. It might be necessary to assign participants to worksites from the same classroom. For instance, students in a basic education class should be grouped into a limited cluster of worksites, or the facilitator will have the difficulty of working with too many worksites.

Cost

Another disadvantage of the facilitator model is its cost. One facilitator can serve only 15 to 20 participants distributed across two or three worksites. For SDAs that assign only small numbers of youth to a worksite, this model is not cost-effective. Assuming salary levels at $480 per week, staff costs per 100 participants would be $2,400 above the costs of operating a traditional summer program, where participants are enrolled in a combination of school and work.

Staff Qualifications

Facilitators must be able to relate to diverse groups of young people and use nondirective techniques to influence others. Because they help teachers use participants' work experiences in the classroom, all facilitators should have some classroom teaching experience or training so that they better understand the standard classroom methods they will be modifying.

Circumstances Best Suited to This Model

The facilitator model is a good choice if the SDA has committed to summer enrichment but has neither the time nor the support from worksites or schools to implement a strategy that depends on their contributions. See Exhibit 5-4.

Teacher-Centered Model

Overview

The teacher-centered model relies on the classroom teacher as the primary agent for summer enrichment and implementor of a classroom-based strategy. The model also calls for the SDA to provide ongoing technical support to the teacher in the form of a worksite liaison/trainer, who helps the teacher integrate worksite tasks and serves as the teacher's trainer and coach in the classroom.

The worksite liaison/trainer visits the worksites to determine how worksite activities can be incorporated in the classroom setting. The liaison/trainer, however, spends most of his/her time helping the teacher implement techniques that demonstrate real-world applications of SCANS competencies and foundation skills.

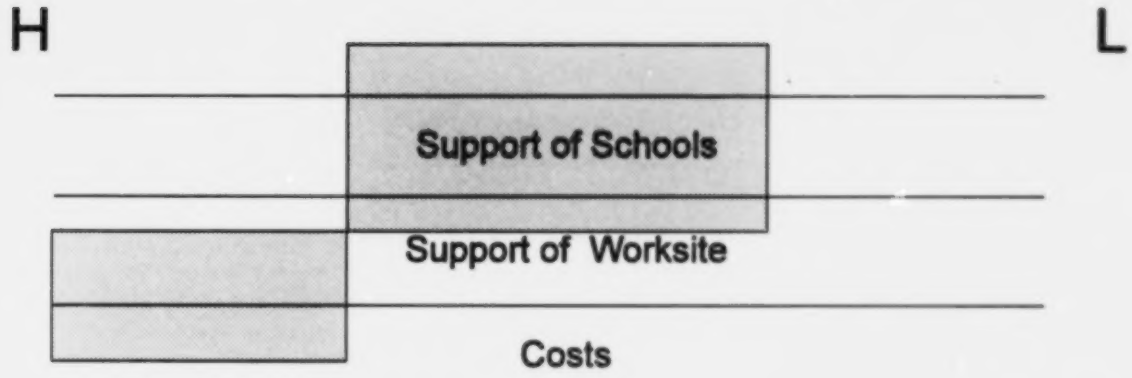
This approach relies very little on the direct involvement of worksite personnel with the teacher; it relies more on the services of the worksite/liaison.

Implications for Organizational Change

Schools must be committed to changing their traditional approaches to classroom instruction if the teacher-centered model is to work. The model also calls for a major investment in teacher orientation and commitment to ongoing on-the-job training under the direction of the worksite liaison/trainer or nonschool personnel.

Exhibit 5-4

Facilitator Model



The model, however, does not require much change on the part of worksites. Worksites must only be willing to share information with the worksite liaison/trainer and host occasional visits.

Risk Factors

The teacher-centered model reduces the risk of total reliance on the abilities and commitment of teachers. It does this through the intervention of the worksite liaison/trainer. By maintaining an SDA presence in the classroom, the quality of instruction and management of potential problems is still under the control of the SDA. However, there is still some risk that teachers will not adapt well to this new style of teaching.

Preparation

Worksite liaison/trainers must learn to analyze the learning potential of work tasks and relate them to classroom instruction, as well as train teachers in this process. The purpose of the model is not to substitute worksite liaison/trainers for teachers, but to help teachers learn the appropriate techniques. Good training skills, therefore, are a prerequisite for this model. Teachers will also need some preliminary training or orientation to help them make the shift from traditional teaching methods to contextual, active learning methods.

The teacher-centered model also requires that some consideration be given to the assignment of participants to worksites and classrooms. Even though such assignment in this model is not as limiting as it is in the facilitator model, participants in two classes should not be distributed among more than eight worksites.

Cost

The teacher-centered model costs less than the facilitator model because one worksite liaison/trainer can cover as many as eight worksites and two classes of participants. However, qualifications of worksite liaisons/trainers will probably make them cost more than facilitators—$580 per week for liaison/trainers compared with $480 per week for facilitators. Assuming 20 participants per class, the cost of this model per 100 participants is $1,450 above the cost of a traditional work-school summer program. Training represents additional cost.

Staff Qualifications

It is advisable to use vocational education instructors as liaison/trainers because they can contribute workplace orientation training to traditional classroom instruction. Having an understanding of workplace and classroom realities will help worksite liaison/trainers bridge the gap between traditional classrooms and ones that use contextual learning. In addition, keep in mind that liaison/trainers who have credibility with schools will find their jobs easier.

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Because the liaison/trainer will operate on the school's turf, he/she must also be able to assist teachers in a nonthreatening manner. Staff, therefore, must not be confrontive and must work well with authority.

Circumstances Best Suited to This Model

The teacher-centered model is well suited to situations in which the SDA has the commitment of the schools, but not the worksites, or for other reasons do not find it practical to engage worksites extensively in the teaching process. This may be merely a matter of logistics, such as when worksites are scattered across rural communities.

The model also assumes some need for ongoing support of teachers. This support is crucial if teachers cannot undergo extensive training or preparation for their roles as primary agents for summer enrichment or if there is reason to believe that teachers may be resistant to change.

When you implement your summer enrichment program, you might use the teacher-centered model to train teachers or to perform general capacity-building for schools. To the extent that you can retain the same teaching staff or institute an extensive training program for participating teachers next year, the model can be modified to phase out all or most of the worksite liaison/trainers, shifting the responsibility for integrating work and learning to classroom teachers. See Exhibit 5-5.

Worksite-Centered Model

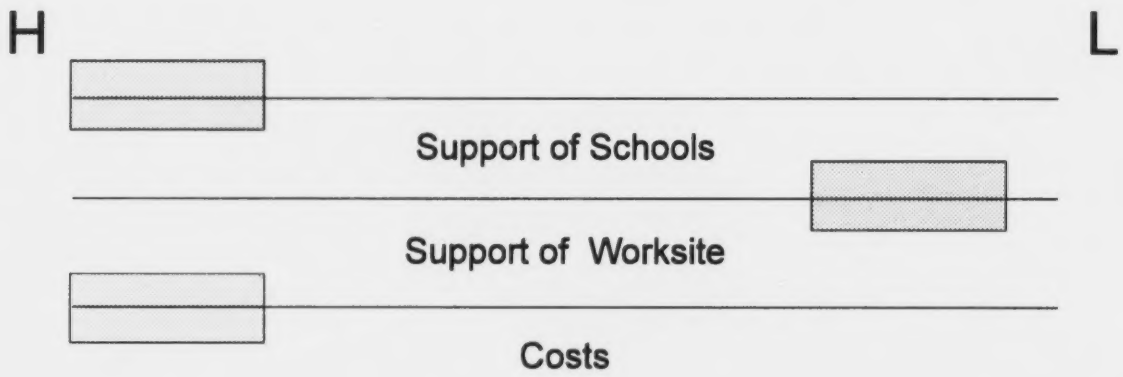
Overview

The worksite-centered model is the mirror image of the teacher-centered model in that worksite liaison/trainers serve as the coaches for worksite supervisors, whose strategy for enrichment is work-based. In this model, there are no classroom teachers or instruction; all learning takes place on the job.

Unlike the classic work-based strategy, in which worksite staff assume full responsibility for teaching SCANS skills, worksite staff in the worksite-centered model share that responsibility with worksite liaison/trainers, who provide on-the-job coaching on an ongoing basis at several worksites. The training provided by worksite liaison/trainers focuses on identifying opportunities for teaching SCANS skills and formulating methods for incorporating learning objectives in work tasks, using the four key elements for implementing the JTPA strategies for summer enrichment It is likely that the liaison/trainers will assume the more time-consuming tasks of organizing a competency-based teaching approach and planning the strategy for teaching related foundation skills.

Exhibit 5-5

Teacher-Centered Model



Implications for Organizational Change

The worksite-centered model requires that worksites be willing to collaborate extensively with SDA worksite liaison/trainers and to adapt to fully embrace a work-based strategy. However, the model does not require worksite personnel to spend much time teaching SCANS skills. The fact that the model does not consume an undue amount of worksite staff time or require extensive worksite staff training makes it is a more appealing proposition for worksites.

Worksites that concur with the concept of integrated work and learning, but have limited staff resources to take full responsibility for organizing and directing the learning process, can still participate in the worksite-centered model. There is no school involvement in this model.

Risk Factors

The primary risk associated with the worksite-centered model is its dependence on the ability and willingness of worksites to balance their concern for immediate accomplishment of production goals with the issue of youth learning objectives. Giving up control of their work projects to youth leadership and the learning process requires worksites to subjugate well-entrenched views about how production goals are best accomplished. If this transformation to a new concept on youth training is incomplete, this model will not save the worksite-centered strategy; however, at least the model warns the SDA about this problem.

Preparation

Worksite staff will need some general orientation to the worksite-centered model to ensure that they understand and assimilate the teaching methods presented by worksite liaison/trainers. Worksite liaison/trainers in this model will need training as extensive as that needed for liaison/trainers in the teacher-centered model.

Because each worksite is an independent learning laboratory, this model poses no constraints on participant assignments. It is useful, however, to assign liaison/trainers to worksites that are conveniently located to one another to minimize the time spent moving among them.

Cost

The worksite-centered model costs less than the teacher-centered model because the cost of teaching participants is borne by worksite liaison/trainers and worksite supervisors rather than a combination of worksite liaison/trainers and teachers (assuming teachers' salaries are part of summer program project costs). Using the unpaid assistance of worksite supervisors, worksite liaison/trainers in the worksite-centered model can serve up to 20 participants at two or three worksites. This model costs more than the traditional summer program that offers no classroom instruction, but work experience only.

Staff Qualifications

Qualifications for worksite liaison/trainers in the worksite-centered model are similar to those in the teacher-centered model; however, a background in vocational education may be less valuable than a background in remedial or basic education. In this model, the worksite liaison/trainer must take the lead in preparing for teaching SCANS skills at the worksite. There is no basic education teacher in the picture. Here there is less concern for workplace integration because such integration is virtually inescapable. A stronger orientation toward basic education may bring a better balance to the teaching approach.

Circumstances Best Suited to This Model

The worksite-centered model is best suited to programs serving large numbers of participants who have an aversion to entering a classroom, but who are amenable to a worksite-based learning environment. The model is also useful when schools are unable or unwilling to participate in an enrichment strategy, but worksites are willing but not able to contribute their employees' time to a classic work-based strategy.

Because the model does not require an extensive training period for non-SDA personnel, it can be launched quickly. This makes it a good model for summer programs that do not have the luxury of a long planning and preparation period. See Exhibit 5-6.

Worksite-Teacher Team Model

Overview

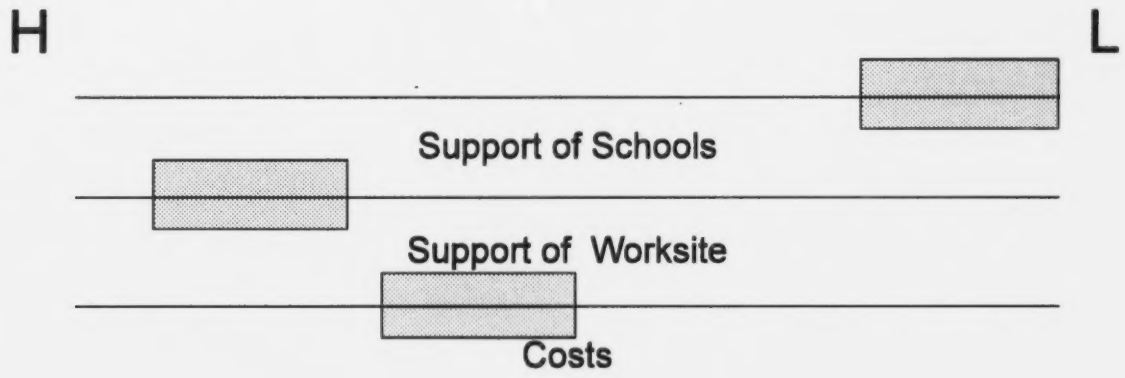
The worksite-teacher team model relies on teams consisting of worksite personnel and teachers who jointly organize a combination of school and work activities that teach SCANS competencies and foundation skills. A two-person team plans the work project and shares the responsibility for teaching the full complement of SCANS skills.

The classroom may be the locus of some instruction, or all instruction may occur at the worksite, as in "vestibule training." Vestibule training is structured classroom instruction that augments on-the-job training and typically occurs adjacent to the worksite, such as in a vestibule.

The enrichment program in the worksite-teacher team model can either be work-based or classroom-based depending on the methods employed and the role of the worksite in the total learning experience. The distinguishing feature of this model is the team approach to developing and guiding the learning process, with the school, as the credentialing partner, taking the lead role.

Exhibit 5-6

Worksite-Centered Model



Implications for Organizational Change

The worksite-teacher team model calls for the commitment of worksites and schools and their ability to change approaches to worksite supervision and classroom instruction. Line staff, particularly teachers, of participating organizations must undergo extensive training in the methods appropriate for a work-based or classroom-based strategy. This model's degree of organizational change is the highest of any model because of the degree of autonomy the respective organizations sacrifice to blend their talents and skills.

Risk Factors

The worksite-teacher team model has several risk factors. First, it depends on organizations outside the SDA for its success. The SDA has little control over the learning process and how the enrichment strategy is implemented. Second, the model is vulnerable to power struggles between the team members or their respective organizations. This problem is somewhat alleviated when the worksite is a school department that reports to the same authority as the teacher.

The effectiveness of the team may be affected by the compatibility of team members. Personalities may become a factor when forming teams.

Preparation

The worksite-teacher team model calls for a major investment in training for both worksite staff and teachers. Training should occur after teams are formed. Organizing teams, conducting training, and providing reference materials takes time—SDA time, teacher time, and worksite staff time. This model, however, does not constrain the assignment of participants to worksites.

Cost

The bad news is that the worksite-teacher team model is expensive to implement. Using teams for each worksite is cost-effective only if worksites engage the same number of participants, 15 or 20, as the traditional classroom. Under these circumstances, this model costs the same as the traditional school and work combination to operate. Because worksites that can accommodate 15 to 20 participants are rare, it is likely that only 8 to 10 participants will be assigned to one worksite. The ratio of teacher to participant, therefore, is 1:8 or half that of a traditional school and work summer program.

In addition, because training time may entail three days of presentations and follow-up technical support, the cost of training will be significant in terms of the return on the investment if trained teachers and worksite staff are not recycled in comparable roles for the year-round program or subsequent summer programs.

Staff Qualifications

Staff in the worksite-teacher team model refers to teachers and worksite supervisors who are members of the team. Because of their constant contact with participants, both groups must exhibit good rapport with young people and be appropriate role models. Also, they must demonstrate the ability to work as a member of a team and be trained in the skills associated with contextual, active learning, as mentioned earlier.

Circumstances Best Suited to This Model

The worksite-teacher team model is best suited to SDAs that enjoy excellent support from their schools and worksites. The model is particularly appropriate for participants who have experienced a high degree of failure in the traditional school environment and for older participants who find it awkward to be instructed in basic academic skills. Because learning is so embedded in the workplace, this model gives participants the opportunity to see learning as a nonacademic experience. In addition, contextual learning is maximized by this model.

Because of the expense of this model, it may only be cost-effective if there is a predominance of large worksites serving 10 or more participants. The cost of training teachers and worksite supervisors also makes an argument for implementing this model as part of a year-round school-to-work program so that training costs provide maximum return on the investment.

One set of circumstances makes this model advantageous to implement. If SDAs have many participants assigned to worksites controlled by the local education agencies (LEAs), this model can be implemented under the auspices of a single authority—the school. This greatly facilitates the effectiveness of worksite supervisor-teacher teams, because the teams are employed by the same organization. See Exhibit 5-7.

Project-Centered Model

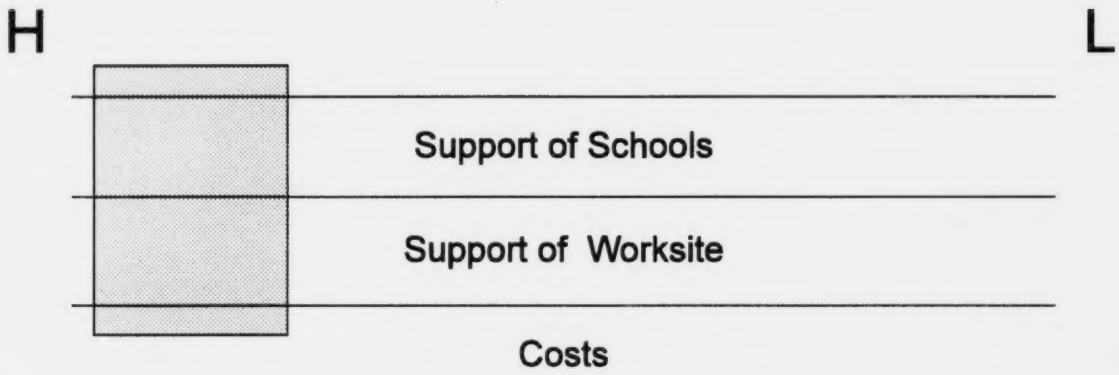
Overview

The project-centered model is an example of an enriched jobs program in which SDA staff take primary responsibility for providing activities that expand the knowledge gained on the job. It links work and learning through the use of a project that complements worksite tasks or simulates a real-life situation (e.g., having participants conduct a mock job search to determine how SCANS skills are used in different occupations and in the actual job search). The project can be conducted in conjunction with classroom and worksite activities, or it can be done as a separate activity.

The main distinguishing feature of this model is that learning enhancements can occur either in conjunction with the worksite or outside the worksite. If a worksite supervisor is willing and able to mentor or work one-on-one with a participant, the SDA case manager plays a nondirective role by suggesting activities that can enrich the participant's work experience. In this case, the learning enhancements occur on the job.

Exhibit 5-7

Worksite-Teacher Teams



If this is not feasible, the SDA coordinator sets up "learning laboratories" in the form of projects that incorporate the four key elements for implementing the JTPA strategies for summer enrichment. These projects are staffed by SDA personnel and link learning to the workplace by providing opportunities for active, contextual learning when it is not possible to accomplish this through either a work-based or classroom-based strategy. In this version of the model, learning enhancement occurs outside the job. Generally, classroom activities are limited or nonexistent.

Implications for Organization Change

The project-centered model requires minimal changes on the part of the worksite. The worksite must be willing to collaborate with the SDA coordinator who is planning work-related project activities. It is helpful if the worksite supervisor participates in the planning, which mandates a commitment to the concept of enriched job programs. If participants are also engaged in classroom instruction, it is likewise helpful if teachers allow students to bring project-related work into the classroom to share with other students or to solicit help from the teacher.

Risk Factors

The project-centered model is relatively risk-free. The responsibility for its implementation rests with SDA staff, and the nature of the projects is such that they usually can be managed easily with little external support.

Preparation

Advanced planning of appropriate projects and how participant schedules can best accommodate projects is a logistical issue that can have a bearing on the success of the project-centered model. Creating projects that are credible real-life simulations is not as easy as it may first appear. If participants do not see projects as relevant, the projects will not inspire sufficient student enthusiasm and, therefore, cannot serve as contextual learning laboratories for SCANS skills.

Some training may be required to enable staff to create opportunities for learning and to empower participants to accept leadership responsibility.

Cost

The project-centered model is an inexpensive model to operate. Usually there is some small cost associated with project activities. The need to rent special equipment or buy materials will necessitate a budget to defray these costs.

Staff costs represent another modest sum because leading project activities can be part of the expanded role of the case manager. This would necessitate smaller caseloads and a larger staff, but the increase in cost would be negligible.

Staff Qualifications

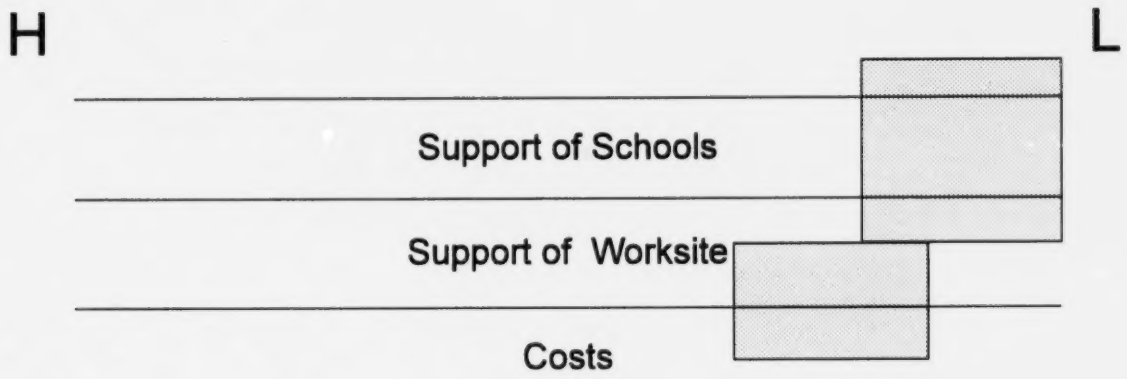
With some in-house training similar to that recommended for teachers in Chapter 4, most case managers can serve as project leaders. In fact, these duties are a logical extension of a case manager's role.

Circumstances Best Suited to This Model

This project-centered model does not offer the same level of academic enrichment as the other four models; however, for SDAs with few resources and limited support from schools and worksites, it is an excellent way to initiate integrated work and learning. It is simple to design and implement and requires little advanced preparation and no special staff expertise. The only training needed is in showing staff how to teach SCANS competencies. See Exhibit 5-8.

Exhibit 5-8

Project-Centered Model



Chapter 6

Computing The Bottom Line

Chapter 6

Computing The Bottom Line

Introduction

Throughout the Change Agent Guide, we have talked about the importance of documenting the results of your summer enrichment program as a means of changing attitudes of reluctant community partners. This would entail conducting some form of objective evaluation that can bear public scrutiny and that focuses on your marketing and change agent goals. There are, of course, many other reasons to examine the impact of a new intervention. Evaluations provide an important source of feedback to support program refinements and improvements.

But in the context of change agentry, evaluations that provide evidence of the worth of a new program constitute irrefutable arguments for support and continuation of a program strategy. Successful programs also attract supporters simply because everyone wants to be associated with success and the inevitable good press and accolades that go with it.

This chapter suggests some options for evaluating your summer enrichment program for the purpose of furthering your organizational change agenda. First, we will discuss the measures of success that you may apply. Measures are types of outcomes or results that would generally be construed as positive effects of summer enrichment.

Then we will talk about some methods for applying the measures. This discussion focuses on how you might organize and plan your evaluation to fit your program configuration and circumstances.

As you proceed through this chapter, think about the organizations that you want most to change and what information about program outcomes would get their attention and support. These become your evaluation objectives. With your objectives in mind, you can see how you might make choices about selected measures and evaluation strategies to conduct an evaluation of your summer enrichment program.

What Are Appropriate Measures of a Summer Program?

There are a wide selection of measures of positive program outcomes that apply to summer youth programs. Your choices will be affected by your marketing strategy or which organization that you are trying to change. For instance, some measures may be work centered, e.g., measures of productivity or absenteeism. Others are pertinent to school settings, e.g., reading and math proficiency.

Exhibit 6.1 is a listing of types of organizations and possible measures that may most influence them. Use this list as a starting point for your own thinking. Additional guidance is offered in the discussion that follows which explains the criteria that evaluation measures should meet.

Exhibit 6-1

Organizations, Measures, and Procedures

Organization	Measures	Procedures
Worksites	1. Absenteeism, tardiness	Tabulation using time sheet forms
	2. Speed by which a routine task is performed to acceptable standards	Rate per minute, hour, or day
	3. Job skills acquired or learned	Numbers and type of job skills—supervisor evaluations
	4. Tasks done independently/minimal supervision	Number and type of tasks—supervisor evaluations
	5. Demonstration of initiative or leadership	Number
	6. Incidents of peer interpersonal skills	Number/supervisor evaluations
	7. Worksite supervisor satisfaction	Surveys
Classroom/Schools	1. SCANS foundation skills	Portfolio assessments
	2. Academic skills, e.g., reading, math, language	Standardized tests
	3. Disciplinary problems	Incident rate by participant/average class rate
	4. Absenteeism, tardiness	Incident rate by participant/average class rate
	5. Attrition	Drop-out rate
	6. Grades/pass-fail	School reports on earned grades
	7. Teacher satisfaction	Teacher survey
PIC/General	1. Favorable press	The number of awards, favorable news articles, participant citations
	2. Positive change in SCANS competence	Portfolio assessments
	3. Participant satisfaction	Participant survey

Objective: The first criterion that your measures must meet is objectivity. Objectivity does not rule out personal judgment. Even anecdotal information can be objective if you follow these procedures.

- Establish consistently applied definitions for elements of the measure. For example, if measures of reading comprehension are to be used in your evaluation, make sure that reading comprehension is defined the same way each time it is applied. This is usually accomplished by using either the same reading comprehension testing procedure or establishing operational definitions that all assessors are using.

- Establish consistently applied procedures for gathering information. If the measure is based on a structured test, e.g., traditional school academic assessments, make sure that the directions for administering and interpreting the test are being followed and the tests are appropriate for the individuals.

  In the case of portfolio assessments, make sure that the organizational framework, forms, and rating rubric are comparable for the same measure.

The term "consistently applied" figures strongly in being objective. You can reduce the extent that individual biases influence the evaluation by specifying as precisely as possible what constitutes the behavior or event that represents the measure and the procedures for conducting the measure.

Quantifiable: Measures should be countable, i.e., they must allow you to speak in terms of "how many." Saying that youth participating in the summer enrichment program demonstrated improved reading comprehension is not sufficient. Your evaluation must say how many youth read at higher levels of comprehension based on an objective measure and consistently applied definition of reading comprehension.

This can be a problem when your data are largely anecdotal; teachers who exclaim about "the difference in the student's attitude" represent important findings that you don't want to loose. Anecdotal data can be quantified by counting the number of positive statements made. In the example above, your objective measure could be the percentage of teachers who compared student attitudes and judged them to be improved.

This calls for consistently applied criteria for determining what constitutes an "improved attitude statement," a survey of all teachers who may be in a position to make comparisons and an accurate count and classification of their statements about student attitudes.

Honest: Exaggeration destroys an evaluation's credibility. This usually occurs when evaluators make claims that the data cannot support, and some careful listener makes that point. The integrity of the evaluation is lost, and the purpose of the evaluation, to win supporters, is forfeit.

Very few Service Delivery Areas can afford the cost of an impact evaluation that could provide irrefutable evidence of the affects of summer enrichment. Nevertheless, avoid the trap of overstating the significance of your findings through using caveats or a brief summary of the limitations of the evaluation, using the words "suggests, appears, or may represent" in place of

"proves," or simply stating the findings without drawing conclusions about them, i.e., letting the readers of the report come to their own conclusions.

Continuing with the example above, results of this evaluation activity could provide a finding that of those teachers who taught students before and after their participation in a summer enrichment program, 70 percent expressed the opinion that student attitudes seemed better, 5 percent thought attitudes toward school were worse, and 25 percent could not tell any difference or had no opinion. Rather than drawing any conclusions about the finding, the results could be shared without comment, allowing the audience to draw their own conclusions with the probability that most people would conclude that the summer enrichment program was responsible for improving student attitudes about school in 70 percent of the cases.

If you make this claim outright, you are inviting justified criticism that other factors may account for the finding, i.e., you have no evidence that improved attitudes are associated with summer enrichment or that the teachers' opinions are not biased by the way the survey was conducted.

An alternative approach is to claim that the finding above **suggests** that in most cases student attitudes are likely to improve as the result of the summer enrichment experience or provides strong indication that summer enrichment has a generally positive effect on student attitudes toward school. These statements can be reinforced by quotes from a few teachers who seem committed to this point of view. Avoiding claims that the evaluation cannot support does not limit the usefulness of the findings for change agent purposes when this alternative is used, nor does it invite attack from critics of your evaluation methodology.

How Does an Evaluation Affect Program Implementation?

Obviously, conducting an evaluation requires its share of summer enrichment resources, primarily staff time. Evaluations can be broken down into three major tasks: designing the evaluation, collecting information, and analyzing information. Of these, collecting information consumes the greatest amount of staff time. Integrating the evaluation tasks with the implementation of summer enrichment activities is critical to the data collection task associated with the evaluation because much of the data can only be collected or is most efficiently collected while participants, teachers, worksite supervisors, and other key people are available and accessible. Whereas the design and analysis tasks can occur within a broad span of time before or after the summer has ended. Managing evaluations well can make the difference between a useful, well integrated evaluation and one whose usefulness is compromised by personnel resentful of the intrusion and extra work it inevitably represents. In this section of the chapter, we offer some tips on organizing and planning the evaluation so that the requirements of the evaluation do not interfere with the normal operation of the summer enrichment program.

Designing the Evaluation: The first task is to design the evaluation with a clear purpose or goal in mind. What do you want to accomplish with the evaluation? There are many options open to you, but because our discussion is in the context of change agentry, we will focus on the following examples of objectives:

- Win support of PIC, additional worksites, or schools so summer enrichment can expand

- Influence schools or worksites to change their methods to facilitate contextual learning activities or provide easier access to resources needed for your preferred summer enrichment approach

- Attract a particular segment of youth to future summer enrichment programs

- Overcome resistance to particular summer enrichment methods or strategies among agency partners

The purpose or goal of the evaluation sets the context for the next step, which is to determine what questions must be addressed by the evaluation in order to achieve its goal.

The study questions drive the data collection activities, which is where the greatest level of effort and cost will be concentrated, so think them through carefully. Each question calls for a requisite number of data elements—pieces of information—that together make-up a complete answer to the question.

For example, suppose the purpose of the evaluation is to show worksites how youth can be more productive if allowed greater responsibility for planning, organizing and directing work related to a project (method A) as opposed to traditional methods of supervision (method B).

Questions that must be answered to achieve this purpose are as follows:

- Using method A, what did youth accomplish?

- Using method B, what did a group comparable in terms of size and similar characteristics accomplish?

- How do the results of the groups compare in terms of important dimensions, e.g., work attitudes and behaviors related to overall efficiency, productivity measures, time lost from tardiness or absenteeism, etc?

For each of the questions above, data elements must be collected to answer the question. For example, some data elements associated with the above questions include the following:

- Characteristics of participants in groups associated with method A and method B

- Size of groups being compared

- Description of supervisory methods employed

- Attendance records

- Amount and type of work accomplished by each group

- Disciplinary actions and other records of work related behaviors represented by each group

- Worksite supervisors' opinions of group productivity and efficiency

The design task also must determine how the data should be collected—questionnaires, interviews, observation, record reviews. This is largely a function of the source of data. The data elements above suggest that at a minimum, worksite personnel and participants will have to be interviewed and attendance records reviewed.

Once data sources and collection methods have been determined (this may require some preliminary inquiries), the design task is ready to compare the resources available to the choice of sample size. Can you afford to collect the data from all worksites representing methods A and B? If not, what number of sites will be included in your sample, and how will the choice of worksites be made?

It is damaging to the integrity of the evaluation effort to choose worksites that are not similar in respects other than their use of supervisory method. This may limit your choice of sample worksites to those that have demonstrated in the past comparable productivity using method B and arranging for half of them to switch to method A. The half that adopts method A can be determined randomly, perhaps by tossing a coin.

The point is **not** to bias deliberately the evaluation results and to make every reasonable effort to control for variables that may influence results, but are not of interest to you. You face practical limits on how much you can control, but if you make a genuine effort to be objective within your limitations, you will have met the "honest" criterion.

The evaluation design task can be done any time before summer enrichment begins, but because it can affect assignment of youth to worksites or which worksites may be designated as enrichment sites, the sooner it is done, the better. The evaluation's impact on the summer program is less likely to create problems later if a detailed plan for conducting the evaluation is done **before** the summer program is planned and the planning of both is well integrated.

Data Collection Task: Most of the data is collected during the start-up and implementation stages of the summer program. At this time, the data sources—names of participants, teachers, other data sources—are specifically identified, and records are located.

To ensure consistency, completeness, and objectivity of the data collection, procedures and forms are usually developed that guide the process of collecting information for the evaluation. This can be done immediately after the evaluation design is finalized so that program staff can integrate data collection activities with their normal staff duties.

To demonstrate using the example above, intake workers may include an addendum to the participant application form to capture more detailed characteristics data to guide assignment of participants to the evaluation worksites. This is done to ensure that the groups are comparable.

Or, case managers may conduct interviews each week to measure participant efficiency along with their normal questions about participant progress.

Staff who are collecting data for the evaluation should be briefed about the procedures and any forms used and how they are to respond when questions arise. Care should be taken to impress

upon them the importance of following directions explicitly, or seeking guidance from the evaluation supervisor, to avoid wide variance in interpretation of the data collection procedures. If information is distorted by biases or differences introduced by the data collectors, the results will be meaningless.

If data collection extends beyond the employment period of program staff, arrangements must be made to ensure that any break in continuity will have no affect on the quality of the data. For instance, if participants are accustomed to interviews with their case manager who leaves at the end of the summer, the followup interviews conducted by a stranger will not represent the same level of rapport and may affect the participants' candor. One remedy is to allow more time for establishing rapport during the course of the followup interviews.

Data Analysis: The final task is to analyze the collected information to answer the study questions. Sometimes, a data matrix is useful for this purpose. Tables of data are other ways that raw data can be aggregated to begin the analysis process.

In our example, participant characteristic data for each worksite would be presented on a table to show how the participants compared on this dimension. Similarly, another table would show the number of participants assigned to each worksite representing method A and B.

Once tables characterizing each dimension are constructed, statements can be made about the interactions of the dimensions. For instance, comparisons can be made about the productivity of groups using method A with groups using method B, differences in productivity of large and small groups, or effects of the two methods on attendance and work related behaviors. These represent findings of the evaluation.

The more ambitious evaluation may choose a cross-cut analysis technique to analyze data. A matrix is prepared where one axis represents each worksite and the other axis represents dimensions or data of interest. This generates multiple data cells that can then be compared in three ways. First, cells representing a single dimension can be compared for every worksite. For instance, the age range of participants can be compared for every worksite to show how they varied between groups using method A and groups using method B. This is similar to the use of a table for this purpose.

Second, all cells for each worksite can be compared to provide a profile of the worksite across key dimensions.

Third, selected cells for each worksite can be compared. For instance, the measures of productivity for each worksite can be related to age of participants and work related behavior ratings.

The matrix has the advantage of allowing an instantaneous cross comparison of multiple features of the worksites being evaluated. Once developed, the matrix facilitates a more comprehensive analysis of the data elements.

The timing of the analysis task is a functions of two factors—the availability of the data and the change agent agenda. Although some of the tabulation of data can occur simultaneously to the data collection task, analysis typically follows the completion of data collection. Likewise, it

should be coordinated with the most opportune time for the presentation of findings to achieve its purpose. Therefore, staff resources must be planned accordingly.

Summary: An evaluation can be very useful tool for winning support of reluctant community agencies if it is well focused and planned in advance. There are common sense guidelines that ensure the integrity of the evaluation and methods for organizing the evaluation so that it does not detract from normal program operations.

The extent of the evaluation effort is a matter of availability of resources and time for planning. Almost any SDA can afford some type of evaluation activity if it is planned in advance so that udata collection activities can be integrated with summer staff's normal work duties.

Appendix A

Interactive Skills for Change Agents

A Handbook

- Some "Do's and Don'ts" for Change Agents
- Basic Communication Skills
- Guidelines for Giving and Receiving Feedback
- Conducting Effective Briefings
- Running Effective Meetings
- Facilitating Focus Groups

Some "Do's and Don'ts" for Change Agents

1. In a group, ***DON'T*** do all of the talking! If you dominate the discussion and deny other people the right to participate, they probably will stop paying attention and begin to resent you.

2. ***DO*** be a good listener. Pay attention to what group members say, paraphrase their ideas, and ask short questions that encourage participation. Be eager to understand other points of view!

3. ***DON'T*** be too quick to disagree! Give the speaker a chance to complete a thought, and encourage other group members to ask clarifying questions before objecting. You will probably find that there is actually more agreement than disagreement.

4. ***DON'T*** interrupt, even if you observe a flaw in the speaker's logic. If you interrupt, you run the risk of excluding yourself from the group. Remember—interruptions usually irritate, and irritation does not promote mutuality!

5. ***DON'T*** be argumentative—the other person just may be right!

6. ***DO*** inquire—***DON'T*** attack! Illustrate good group behavior by disclosing your own attitudes, beliefs, commitments, plans, and ideas. Launching an offensive will drop the curtain on participation and, like an interruption, may exclude you from the group.

7. ***DO*** paraphrase differing opinions until everyone agrees that you understand the issue. As a change agent, this will strengthen your position in the group as you help clarify issues and set the stage for consideration of alternative solutions.

8. ***DO*** keep the group on track. If a group member begins to digress, tactfully interrupt, postpone consideration of the new topic, and bring the discussion back to key issues.

9. ***DON'T*** be afraid to acknowledge that someone else may be right—even if you vehemently disagree with him/her at first. Give the group the opportunity the examine both sides of an issue.

10. ***DO*** admit your own errors! There never was, and never will be, a person who does not make mistakes!

11. ***DO*** remember that the words "meeting" and "conference" often generate such comments as "Not again!" If you can quickly transform group agreements into action, you will win the respect of group members and make them feel that another meeting just may be worthwhile!

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12. ***DON'T*** expect all group members to participate immediately. Some people need a longer warm-up period before they feel comfortable speaking up in groups. Gently encourage participation, but don't push.

13. ***DO*** be satisfied with small gains in the early stages of facilitating change. Remember Neil Armstrong's words when he stepped on the moon for the first time: "That's one small step for man, one giant leap for mankind."

Adapted from *Administrator Leadership Clinics: NAESP-NASSP*. Produced under Grant Number OEG-0-73-6122, funded under the Right to Read Effort, U.S. Office of Education.

Basic Communication Skills

Many hours of study have been devoted to the importance of good communication skills in successful personal and professional relationships. Despite these many costly hours of research, misunderstanding, misinterpretation, and plain lack of communication continue to cause negative reactions ranging from hurt feelings to million-dollar mistakes.

Given the diversity of our society, it is not surprising that we frequently miscommunicate. When applied to communications, the colloquial phrase "Do you know where I am coming from?" is quite relevant. In our everyday interactions we are likely to encounter and communicate with people from different geographical regions, ethnic and socioeconomic backgrounds, and upbringings. Is it any wonder that we frequently feel misunderstood?

Following is a brief discussion of basic communication skills. Above all, an agent of change must be an effective communicator. These skills will be essential tools as you take on your new role.

Listening

Listening is not synonymous with hearing. Hearing is the physical part of listening—it relates to our ears sensing sound waves. Listening involves not only hearing, but also the interpretation of what was heard, which leads to either understanding or misunderstanding, the evaluation of what was heard, and the decision about how to use the information.

Studies show that we spend about 80 percent of our waking hours in some form of communication. Although we are taught to speak almost from the time we are born, and taught to read and write starting at about age 4 or 5, we are never formally taught how to listen. If we presume that studies are true, then we spend about 40 percent of our time doing something for which we are not trained because we take it for granted.

When you listen attentively and respond appropriately, you demonstrate sincerity, enthusiasm, and concern. The behavior you exhibit and the type of response you make will differ depending on the purpose of the message. The following chart describes the purpose of messages and relates it to appropriate behavioral and verbal responses.

LISTENING AND RESPONDING		
Purpose of Message	**Your Behavior**	**Example of Your Response**
To establish and maintain a nonthreatening atmosphere	Don't agree or disagree; use noncommittal words and positive tone of voice.	"I see." or "Uh huh." "That's interesting."
To show you are listening and understanding To let the speaker know you grasp facts	Paraphrase basic ideas; emphasize facts.	"If I understand, your idea is ..." "In other words, your decision is ..."
To show you are listening and understanding To let the speaker know you grasp feelings	Reflect basic feelings.	"If I understand correctly, you feel that ..." "In other words, you were pretty disturbed by ..."
To help the speaker clarify the content	Ask clarifying questions.	"What do you mean by ...?" "Can you give me an example?" "What alternative have you considered?"
To pull out important ideas, facts, and feelings To establish a basis for further discussion To review progress	Paraphrase and reflect major ideas and feelings.	"These seem to be the key ideas you've expressed so far ..." "If I understand you, you feel this way about the situation ..."

Good listening habits have their basis in the Golden Rule: "Do unto others as you would have them do unto you." The following list of "Do's and Don'ts" sums up how the Golden Rule applies to listening skills.

DO's
Pay attention both to verbal and nonverbal messages. In other words, pay attention to how something is being said as well as to what is being said.
Listen for ideas, not just words, so that you get the entire picture.
Resist the temptation to wrap up a statement or problem before the speaker gets to the end.
Use occasional interjections such as "I see" or "yes" to show the speaker that you are following the conversation.
Concentrate on what the speaker is saying, not what you think will be said next.
Stop talking! You can't listen if you are talking.
DON'Ts
Don't fake understanding. If you are not sure what was said or what was meant, ask a clarifying question.
Don't say "I know how you feel." Demonstrate your understanding by paraphrasing what you heard.
Don't interrupt. Be patient and allow some time for pauses.
Don't begin formulating your response until the speaker has presented a complete thought.
Don't allow your own biases to influence what you hear. Be aware of your biases so that you can overcome them.

It is a fact that we think a lot faster than we talk. The average person speaks at between 110 and 125 words per minute. However, our minds race along at about five times that rate. This discrepancy gives our minds plenty of time to wander. Use the previous tips to sharpen your listening skills and become a more effective change agent.

Paraphrasing

Paraphrasing is generally linked to good listening skills. However, this is a skill that is essential in facilitating change and, therefore, is given special attention in this discussion. Paraphrasing is simply restating what the speaker has said or stating the meaning of what was said in different words for clarification.

For change to occur in a number of organizations simultaneously, all of the partners and work group members must agree on the nature of the problem and the approach to a solution. As stated earlier, based on our diverse society, there is a greater possibility for us to miscommunicate and misunderstand one another than it is for us to "get it right." As a work group facilitator, you will have to ensure that all the members of the group know what they are agreeing to before proceeding with a plan.

One way of ensuring understanding is by paraphrasing statements made by a work group member for the group as a whole. Refer to the Listening and Responding Chart for appropriate statements to use in paraphrasing. For instance, you may begin by saying "In other words, you are saying that ..." or "If I understand you correctly, your idea is ..." Hearing you restate the idea, the speaker has the opportunity to clarify any misunderstandings. In reaching consensus, it is a good idea to encourage all work group members to paraphrase as well as ask questions to ensure understanding.

Describing Feelings, Behavior, and Facts

The words we choose have a powerful impact on our listeners. The use of emotionally laden descriptors and words that reflect biases are more likely to make a listener defensive and cause misunderstanding than they are to emphasize a point. In taking on the role of change agent, it is important for you to be clear in your communications and use language that facilitates understanding and consensus. Here are some fairly simple guidelines to help you describe feelings, behavior, and facts.

Feelings: Describe your own feelings only. Attempting to describe someone else's feelings can be dangerous if you either overstate or understate the intensity of those feelings. Further, if you try to "get rid of bad feelings," you run the risk of denying the other person's right to his/her feelings (e.g., "It's not that bad ..." or "You shouldn't feel that way ...")

Behavior: Describe only what you see, not what you think is going on. You can easily get into trouble by ascribing a motive to another's behavior. To be on the safe side, describe only observable behavior and avoid analyzing what you see.

Facts: As with behavior, do not try to interpret facts; simply report what you know. Adding your own interpretation becomes editorializing, which is giving your opinion of the facts rather than the facts as they are. Remember, your perceptions and opinions are your own, not everyone else's.

Nonverbal Communication

A great deal of meaning is conveyed nonverbally—through gestures, eye contact, voice cues, and posture. Nonverbal cues "demand" a response from other people in a conversation.

Nonverbal communication is more involuntary than verbal communication. Nonverbal and verbal communication occur together, and when they contradict each other, the nonverbal overrides the verbal. Following are discussions about important nonverbal cues.

Posture: Correct posture communicates confidence. If you are standing, the best speaking position is standing comfortably with feet about 6 inches apart and one foot slightly in front of the other. A good way to indicate a significant point is to take a step forward as you make the point. An effective way to make a transition to a new thought is to pause slightly, then take a step back or walk to one side. If you are sitting, the most appropriate posture is somewhere in between standing and sitting up "ramrod" straight. Sit comfortably and lean forward slightly to emphasize an important point.

Gesture: Any gesture that calls attention to itself draws attention to the delivery, rather than the content, of the presentation. Avoid such gestures as playing with change in your pocket, repeatedly jabbing the air with your finger or chopping at the air with your hand, and clenching your fists.

Use gestures to enhance and reinforce your message. Effective speakers use natural conversational gestures such as leaning forward, reaching out, and making natural hand movements.

Facial Expression: Many components operate in conjunction to produce facial expressions. The forehead and eyebrows, eyes, mouth, jaw, and facial muscles work together. Try to make your expression relaxed, and don't forget to smile when appropriate.

Appearance: Factors that influence appearance include dress, grooming, hair style, jewelry, and cosmetics. We stereotype others by the way they talk, the language they use, the way they move, and the way they look. Before someone even speaks, we make a number of judgments based on appearance. Always maintain a professional appearance.

Voice: Put expression in your voice, and show enthusiasm. Natural and appropriate expression makes you a more convincing speaker. Following are voice variables to consider:

- *Rate of Speech*—The human mind can process information at about 600 words per minute. However, we can only speak effectively at about 110 words a minute. Speaking distinctly and naturally when making presentations is more convincing than using theatrical speech patterns.

- *Pitch*—Allow your voice patterns to rise and fall with the points you want to emphasize. Show natural enthusiasms; avoid a monotone that puts people to sleep.

- *Volume*—Speak loudly and clearly enough so that everyone in the room can hear you; change the volume and pause to emphasize points.

Eye Contact: Your single most effective communication tool is eye contact. It makes your message more believable and understandable, and it personalizes meaning. Eye contact also helps you overcome nervousness. However, keep your eye contact natural—people get uncomfortable when they feel they are being stared at.

Guidelines for Giving and Receiving Feedback

Giving Feedback

1. Ensure Readiness of the Receiver

Give feedback only when there are clear indications that the receiver is ready for it. If not ready, the receiver will likely not hear the feedback or will misinterpret it.

2. Be Descriptive, Not Interpretive

Giving feedback should mean acting as a "candid camera." It should be a clear report of the facts, rather than your ideas about why things happened or what was meant by them. It is up to the receiver to consider the reasons for and meaning of the event or to invite the person giving the feedback to enter into the discussion.

3. Describe Recent Events

The closer the feedback is given to the time an event takes place, the better. When feedback is given immediately, the receiver is likely to be clear about what was meant. The feelings associated with the event still exist and therefore can be used to understand what the feedback means.

4. Give Feedback at Appropriate Times

Feedback should be given when there is a good chance it will be helpful. Feedback may not be helpful if the receiver feels that there currently is other work that demands more attention. It is also good to keep in mind that critical feedback in front of others may be more damaging than helpful.

5. Describe New Things

There is a tendency when giving feedback to say only the obvious. Consider whether the things to which you are reacting really may be new information for the receiver. The information should not simply be a report on what you saw the receiver doing, but rather a report on the way it caused you to feel or the situation you felt it put you in.

6. Describe Changeable Things

Feedback can lead to improvement only when it is about things that can be changed.

7. Do Not Demand Change

Feedback should not be confused with asking a person to change. It is up to the receiver to change and to consider whether he/she wishes to change on the basis of new information. It might be helpful to include that you would like to see him/her change in certain ways. What is not apt to be helpful is to say, in effect, "I have told you what's wrong with you, now change!"

8. Do Not Overload

When learning how to give feedback, we sometimes tend to overdo it. It's as if we were telling the receiver, "I just happen to have a list of suggestions here, and if you'll settle back for a few hours, I'll read them to you." The receiver replies, "Wait a minute. I'd prefer you give them to me one at a time at moments when I can really work on them. I can't handle a long list at once."

9. Give Feedback To Be Helpful

You should always consider your own reasons for giving your reactions. Are you trying to be helpful to the receiver? Or are you really just getting rid of some of your own feelings or using the occasion to try to get the receiver to do something that would be helpful to you? If you are doing more than trying to help the receiver, share your additional reasons for giving feedback so that he/she will better understand what you are saying.

10. Share Something With Receiver

Giving feedback can sometimes take on the feeling of one-upmanship. The receiver goes away feeling as if he/she is not as good as the giver, because his/her potential for improvement was the focus of the feedback. The giver may feel as if he/she has given a lecture from the lofty pinnacle of some imaginary state of perfection. The exchange often can be kept in better balance by the giver including some of his/her own feelings and concerns.

Receiving Feedback

1. State What You Want Feedback About

Let the person giving feedback know specific things about which you would like his/her reactions.

2. Check What You Have Heard

Check to be sure you understood what the person was trying to say. Because the topic was your own behavior, you may tend to think about the meaning of the feedback before you are sure you heard it as it was intended.

3. Share Your Reactions About Feedback

Your own feelings may become so involved that you forget to share your reactions to feedback. If the person who talked to you leaves not knowing whether he/she was helpful and how you feel toward him/her, that person may be less apt to give feedback in the future. The giver needs your reactions about what was helpful and what was not to know whether he/she is giving you useful feedback.

Adapted from Human Resource Services, Department of Education, Tallahassee, Florida.

Conducting Effective Briefings

A briefing is simply the presentation of information in a logical and condensed form. There are four types of briefings: persuasive, explanatory, instructional, and narrative. You most likely will have occasion to use all four types as you build your coalition and implement your program. Each type is described below.

- **Persuasive** briefings are designed to excite an audience and convince it to invest in some way in an organization's products, services, or goals. For instance, you might prepare a briefing for a group of worksite supervisors to spark interest in the work and learning concept. In this case, the briefing would be designed to "hook" the supervisors on the idea and give them confidence in the goals of the program and the abilities of program operators.

- **Explanatory** briefings are used to present basic information to give the audience new information or to enhance understanding. Although persuasion is part of this type of briefing, it is not the main goal. You might use this type of briefing with your work group or employers and educators who have been involved in summer work and learning programs in the past to explain the focus of the program.

- **Instructional** briefings are given to teach others how to use something, such as a new procedure or form. For example, you would use this type of "mini training session" to show staff how to use portfolio assessment.

- **Narrative** briefings are used simply to bring an audience up to date. An oral progress or status report can be considered a narrative briefing.

Regardless of the type of briefing you are giving, there are six steps to follow to prepare your presentation:

1. **Establish your objectives.** You should be clear about the purpose of the briefing and your hope about its results. Do not confuse the objective of the program with the objective of the briefing.

   For instance, if you are giving a persuasive briefing to a group of worksite supervisors to solicit their participation in work groups that will develop projects to meet certain skill requirements, the objective of the briefing is to encourage supervisors' participation, not to develop the projects.

Just as your objective must be realistic in terms of your expected results, these results must be realistic in terms of the following:

- Scope—Can you prepare and present the briefing in the time available?
- Audience's knowledge and background
- Audience's ability to act

2. **Analyze your audience.** Be sure that you have a clear picture of who your audience members are so that you can tailor your briefing for them. Ideally, you should know their motivations, knowledge, and opinions; the advantages and disadvantages of the briefing objectives to them; and what their "hot buttons" are in relation to the subject.

   For example, if your audience is a group of teachers who have staffed the educational component of summer programs in previous years, and you are briefing them about the procedures for operating a worksite-based work and learning program, you will have a basis of understanding already. If you make some general assumptions about the teachers, you might say that they are motivated to be involved in the program because they believe they can make a difference in the lives of their students. They obviously know a lot about summer youth programs and probably have a high opinion of them, given that they are taking part in a program again. At this point you may need to check the validity of your assumptions and begin gathering information relating to the remaining questions.

   In the briefing, you can capitalize on the audience's motivation by being enthusiastic and factual when describing how work and learning programs benefit participants. You can use the teachers' knowledge of summer programs by comparing the programs in which they were involved with the work and learning program. Knowing what their "hot buttons" are will be useful in dispelling their fears about and garnering support for the changes they are facing.

3. **Prepare your preliminary outline.** Once you have established the primary objective of the briefing and analyzed your audience, you should begin to develop the specific objectives to be covered in your presentation. What are the main ideas and concepts you want to present? What points do you need to make to achieve your desired results? Write your ideas in conclusive, complete sentences, and include the reasons why the idea needs to be presented. Be sure that your ideas lead directly to accomplishing your specific objective and the results you are seeking. Do not include more than five major ideas in your presentation. Remember, this is a briefing!

4. **Select resource material to support and enhance your presentation.** For each main idea, identify and list the material you will need to support the idea in an interesting and effective manner. Ask yourself these questions about your material:

   - How much detail is needed?
   - What is the best way of communicating my main points to this audience?
   - Do I want the audience to respond immediately, or am I planting seeds for future action?
   - What material should I withhold from the briefing so that it can be used in the question-and-answer session?
   - Are each of my main ideas essential to meeting the objective?

   Do not make the mistake of including too much material! Use visual aids in the form of overhead slides, flip charts, and handouts to enhance your presentation. Be sure that your aids are of high quality and to the point.

5. **Organize material for effective presentation.** This is the time to develop a specific presentation outline. Most briefings can be divided into three major elements: introduction, body, and conclusion.

   - **Introduction**—This is where you capture the audience's attention and state the main idea of your briefing. You can do this by asking a question you will answer later, relating an interesting incident or anecdote, giving an arresting fact, or making a promise. Whatever you do make it engaging—if you lose them here, you've lost them for good.
   - **Body**—The purpose of this section is to develop the main ideas and build support for them. To do this you can use support devices such as facts, figures, statistics, definitions, examples and illustrations, anecdotes, and authoritative statements. Be sure that your support devices are relevant and accurate, easy to explain, and present a strong argument against opposing views.
   - **Closing**—To "drive home" your idea at the end of the presentation, review the purpose and restate the main ideas. You may want to appeal to the audience for some action and open a discussion or question-and-answer period. Make every effort to finish in the time allotted—don't sabotage the results by keeping people past the time you promised to let them go!

6. **Practice, practice, practice!** This is perhaps the most important step in your preparation. You can develop a dynamite briefing and completely blow it by stumbling through the presentation! Rehearsing gives you the opportunity to time yourself and become more comfortable with the material and with speaking naturally so that you do not have to rely on your notes. In addition, rehearsing gives you the opportunity to identify any flaws in your material. Try giving the presentation aloud to yourself, then tape (audio or video) yourself, and then try to get an audience of friends or coworkers together to critique your performance. Finally, take some time to sit back, close your eyes, and visualize yourself making a truly successful presentation!

Running Effective Meetings

Effective meetings mean results! Meeting objectives are accomplished because the group is able to work together in a reasonable amount of time. The right content (objectives), the appropriate process (group behavior), and sufficient time (logistics) are the key elements in achieving results. The objectives should be clear and relevant, no one individual should dominate or disrupt the group, the group should remain focused on the objectives, there should be adequate time for everyone to participate in the discussion, a positive outcome should be achieved, and everyone should leave the meeting feeling good! Sounds impossible, doesn't it? It can be done, however, if you are skilled in the three primary functions of a meeting leader:

1. Planning the meeting
2. Keeping the meeting on course
3. Evaluating the meeting and following up

Following is a discussion of each of these functions.

Planning the Meeting

Careful planning is necessary to meet all the criteria mentioned previously. Meeting planning includes six basic steps:

1. **Define the purpose of the meeting.** Being precise in this definition will ensure that your planning time and energy will be well spent. Basically, meetings are held for one or more of five purposes. The following table reviews these five purposes and lists who should be involved in each.

MEETING PURPOSE MATRIX			
Basic Purpose	**When**	**Who**	**Caution**
To give or get information	Group leader or members need to share or receive information.	Those who must master the information	Use a meeting format only if the information requires explanation, discussion, or clarification. Otherwise, a memo might be more efficient.
To solve a problem	Problem exists in which group resources can be used to find a solution.	Those affected by the problem	Be sure to clearly identify and define the problem before looking for solutions.
To make a decision	Group input is valuable to the decision-making process and the resulting outcome.	Those who must implement the decision	The best way to begin this type of meeting is to "decide how to decide" (i.e., consensus, majority rule, etc.).
To organize and plan	General responsibilities are known. Group now needs to define goals and plan course of action.	Those responsible for the work	This type of meeting requires the most amount of time. Be sure to budget enough time to accomplish all of your objectives.
To initiate specific action	Organizational planning is completed. Group is now ready to begin delineating tasks.	Those responsible for getting the tasks done	It is a good idea to record during the meeting who has assumed which responsibilities.

If you determine that your meeting has more than one basic purpose, you need to think about how the purposes relate and which one should logically be accomplished first.

2. **List the attainable objectives.** Once you have established the purpose of the meeting, derive a list of possible objectives from the purpose statement. Prioritize the objectives and then make a list of the objectives of highest priority that can be addressed in the time planned for the meeting.

3. **Develop an agenda to meet the objectives.** The welcome and adjournment are required on every agenda. Following are other standard elements that are often included:

   - Introductions
   - Announcements
   - Review of previous meetings
   - Breaks
   - Scheduling of future meetings

   To establish a list of agenda items that best accomplish your objectives, it is recommended that you use the same process of prioritization that you used to establish the objectives:

   - Make a list of all possible ways to accomplish each objective.
   - Set priorities for each objective.
   - Select the high priority actions or combination of actions that will best meet your objectives.

   Finally, order your agenda items in terms of one of the three of the following:

   - Time—Items requiring the greatest amount of time are scheduled first.
   - Importance—Items of the most critical importance are scheduled first.
   - Chronology—Items are scheduled in a "building" order that makes sense in terms of the process of accomplishing the work (i.e., clearly defining a problem before discussing solutions).

4. **Select and inform the participants.** First, notify meeting participants either orally or in writing. Regardless of which method you choose, the notification should include a statement that identifies you as the meeting leader, gives a brief description of the meeting purpose, and explains why the participant would be a valuable asset.

Second, discuss the logistics—date, time location, any special provisions, and the date or time by which the individuals should notify you about whether they will attend the meeting. It is usually better to postpone a meeting than it is to hold it with too few participants.

It is advisable to provide the participants with a copy of the agenda before the meeting. This gives them a chance to fully understand the meeting purpose and to think about their contributions.

5. **Identify and prepare materials and logistics.** This planning step does not take much time, but it is invaluable! Make yourself a checklist to review before the meeting (a few hours or days depending on the nature of the materials you will be using).

    - Materials and supplies you need to check for will change from meeting to meeting, but generally they include copies of the agenda, copies of handouts, prepared flip charts or other visual aids, name tags, note paper and pens, flip charts, projector and replacement bulb, and extension cord.

    - Logistical considerations that should be included on your checklist are the size of the room (Is it large enough? Is it suitable for using audiovisual equipment?), adequate lighting, heating/air conditioning, appropriate room arrangement, and adequate number of chairs.

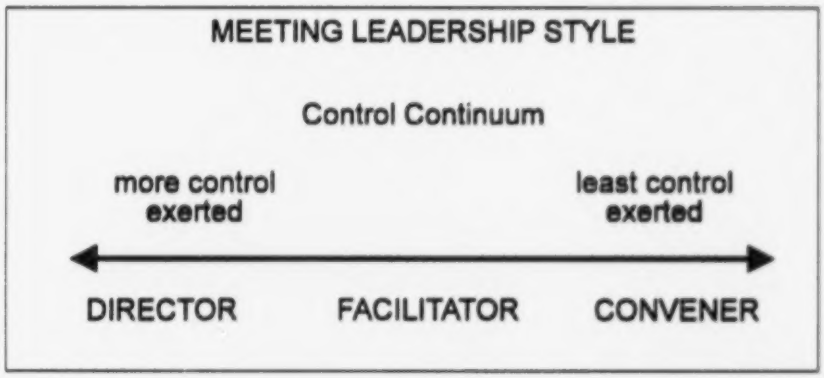
6. **Choose recording and evaluation methods.** Be sure that you have designated a person to record the meeting, and review with him/her the type of information that is most important. The following table refers back to the five basic reasons for holding meeting, and shows what type of information is most essential.

MEETING INFORMATION CHECKLIST	
Meeting Purpose	**Record This Information**
1. To give or get information	The main points of the information presented
2. To solve a problem	The specific definition of the problem and all possible solutions
3. To make a decision	The final decision and all main points leading to and supporting the decision
4. To organize/plan	All defined goals and the specific work plans organized in the meeting
5. To initiate a specific action	All delegated responsibilities, the individuals assuming the responsibilities, and the time guidelines for accomplishing tasks

Evaluation of the meeting process is an important step that should not be missed at the conclusion of the meeting. Evaluate the meeting simply by reviewing the objectives and discussing the meeting outcomes with the participants or by distributing an informal questionnaire and asking participants to write their reactions to the meeting.

Leading Meetings

The degree of control that you exert in a meeting is your leadership style. The following diagram illustrates the range of styles, from authoritative to laissez-faire.



The meeting leader who feels the need to exercise complete power and full control at all times adopts the director style. The director assumes that he/she is the best judge of what needs to be done and how it should be done.

A second leadership style is the facilitator. This meeting leader assumes that participants should be given reasonable freedom of action, equal opportunity to contribute, and full responsibility for their assigned tasks.

The third type of meeting leader is the convener. This leader assumes responsibility for arranging the meeting and assembling the participants. The convener does not contribute to or take responsibility for the meeting except as a participant.

No leadership style is right or wrong. Such considerations as meeting purpose and time constraints determine which style is appropriate. If a project must be organized within an hour, the director style will probably be most effective. If a decision that directly affects each participant needs to be made, the facilitator style is probably best. If a problem has to be solved between groups or individuals, the convener style is the best approach. You will need to consider these factors and then choose the leadership style that best suits the purpose of the meeting.

It is imperative for you to get participants to work together to accomplish the objectives of the meeting. To do this, you need to know something about group process—the way people interact, communicate, and relate to one another. Group process is not what the group members are doing, but rather how they are doing it.

If we use an analogy here, meeting content and purpose can be viewed as an iceberg. The content is the tip of the iceberg—the part we can see. The process is akin to the area of the iceberg that is below the water—it cannot be observed, but it is often the greater part of what goes on in a group. Group content includes the following:

1. The task the group is attempting to accomplish
2. Task information
3. Public agenda for the meeting
4. Formal rules by which the group operates
5. Formal authority structure in the group
6. Formal purpose or mission of the group

The process of group interaction, by contrast, includes the following:

1. How the group works together in accomplishing the task
2. Feelings of the group members
3. Hidden agendas of the group members
4. Unwritten norms of behavior
5. Informal leadership in the group.
6. Group members' own needs

The ways in which the content and the process issues interact in any group affect how well the task gets done. If the group process is ineffective and the elements of open participation, exchange of ideas, and effective problem solving are missing, the task will not be accomplished successfully regardless of the expertise of the group. To understand group process, it is helpful to become familiar with the three categories of meeting behaviors:

1. "Getting the Job Done" Behaviors—As the phrase suggest, these are task- oriented behaviors. Without certain group members acting out these behaviors, nothing would be accomplished!

2. "Keeping on Board" Behaviors—These behaviors are every bit as important to conducting a successful meeting as the Category 1 behaviors. Without some of the group members performing these behaviors, the work of the meeting might get done, but nobody would feel good about it!

3. "Off Course" Behaviors—Behaviors in this category disrupt the meeting process, keep work from being accomplished, and make other group members uncomfortable or angry.

Following are lists of behaviors that people exhibit in each of the three categories. People will not always display the same behavior type during the entire group process. Instead, they will switch from category to category depending on the circumstances.

"Getting the Job Done" Behaviors	
1.	Initiating—Developing and contributing new ideas or stimulating the group to undertake new directions
2.	Summarizing—Pulling ideas, suggestions, and activities together
3.	Clarifying—Helping group members understand what is being said or what is happening in the group
4.	Information seeking—Asking for clarification of facts
5.	Information giving—Offering facts or generalizations about issues
6.	Decision testing—Seeking consensus on the content of decisions the group has made
7.	Monitoring—Keeping track and informing the group of progress
"Keeping on Board" Behaviors	
1.	Encouraging—Commending and supporting the contributions of others
2.	Harmonizing—Mediating differences among others
3.	Gatekeeping—Ensuring that everyone's opinions/ideas are heard
"Off Course" Behaviors	
1.	Blocking—Insisting on positions or bringing back issues the group has rejected
2.	Dominating—Attempting to exert authority by manipulating the group
3.	Avoiding—Withdrawing from the group

"Off course" behaviors usually indicate that the person is not getting his/her needs met by the group process. It is important to remember that just because someone is blocking, for instance, it does not necessarily mean that it is his/her motivation to be a troublemaker. The "blocker" may see the need to block group process to get a point across. Once that goal is accomplished, the person may not have the need to block any longer.

It is important to remember that unless many of the task and maintenance roles are executed in the meeting process, tasks may not be accomplished. Without initiating behavior, it is difficult to get things under way. Without information seeking and information giving, there will be little exchange of ideas. Unless decisions are confirmed by the group, the participants may be confused about what has been decided and may be unclear about whether the meeting goals were actually accomplished. Unless there is harmonizing or gatekeeping, which allows the contribution of creative input, progress toward task completion may be seriously impeded.

Finally, it is important to recognize nongroup behavior. This type of behavior, if handled effectively, can alert the group to a need for change. The meeting leader has the responsibility to observe the group process and to get the maximum from the group by assisting in overcoming problems.

Maintaining Direction

Maintaining the direction of a meeting is not always easy. The following tips and techniques may help. A word of caution is in order, however. Be sure to use tact in handling these situations. You do not want to discredit anyone's idea or discourage anyone's participation.

- **Refer to the objectives.** The best way to bring off-course discussion back to your topic is by referring to your well-defined objectives. If the point being made does not relate directly to accomplishing the objectives, tell group members that the point needs to be presented at a later time. The following statements can be used to bring the discussion beck to the objectives:

  "That is an interesting idea, Sam. I'd like to hear more about it after we've taken care of these objectives."

  "You've made an important point, Barbara. I want to schedule that for further discussion at our next meeting."

- **Ask direct questions.** Many times meeting discussion that goes off course can still be somewhat relevant to your objectives. You can use direct questions to guide the discussion back to the objectives. Do this by paraphrasing or referring to what has been said and relating it to the objectives. For instance:

  "You are saying, then, that the project should not be expanded to include these points?"

  "Based on what you just said, would you agree with this idea?"

  Sometimes a meeting discussion can become too narrow to encompass the scope of the objective. In this situation, a follow-up question can be used to expand the discussion and encourage a more divergent outlook from participants. Here are some sample follow-up questions:

  "Why don't we take that idea one step further?"

  "Are there other alternatives that we can consider?"

Monitoring and maintaining direction of communications in the group is an important function of the group leader. All too often, precious time is lost due to a communication problem. Participants who assume that they understand one another at the beginning of a meeting often find later that they waste time arguing unnecessarily.

You can avoid wasting time by clarifying (helping participants understand what is being said) and monitoring (keeping track and informing participants on meeting content and progress). If behavior that takes discussion off course becomes a problem in a meeting, you may want to try the following techniques:

Behavior	Technique
Dominating	• Interrupt tactfully with a question or summarizing statement. • When the talker pauses, rephrase one of his/her statements and move on. • Allow the group to cut off this participant.
Avoiding	• When asking a question, make eye contact with the participant. • Involve this participant in small group work and ask him/her to report back. • Ask this participant a direct question.
Blocking, Argumentative	• Ask participant to summarize the position with which he/she disagrees. • Change the subject. • Let the group handle this participant.
Side Conversations	• Stop talking and wait for side conversation to end. • Ask one of the talkers a direct question.

Handling Group Problems

Sometimes a group experiences problems that prevent it from accomplishing meeting goals. Generally, you can recognize clues to these problems and intervene to bring the meeting back on course. The following chart identifies these clues and the problems they indicate, and possible interventions are suggested.

Problems	Possible Reasons	Suggested Intervention
Task Avoidance • Dodging main issue • Discussing extraneous, peripheral points	Group • Fears size and consequences of problems • Feels inadequate to handle issue • Lacks desire to work hard • Feels uninvolved • Feels hostility toward leader or dominant member • Expects conflict over main issue • Fears consequences of making decision	Leader or Participant • States observed clues; checks if others observed same; suggests group discuss why it is avoiding task • If group is unable to openly discuss problem, leader can suggest following method: Each group member writes his/her diagnosis of problem on a sheet of paper and places it in middle of table; the papers are mixed to guard members' identities and are then read aloud by one group member; and after reading all papers, group begins discussion.
Participant Impatience • Group is on edge • Members speak vehemently • Group is polarized and refuses to compromise • Participants launch personal attacks	• Group's dissatisfaction with itself • Resentment toward perceived "pushy" leader • Emotional problem known to all but not dealt with • Anger toward one individual	Same as in Task Avoidance. Once clues become apparent, diagnosis and dealing up front with problem must take place.
Ideas are Attacked • Statements are attacked before participants complete them • Every suggestion is considered impractical • No real listening occurs	• Issue has become polarized • Group has divided into 2 or more hostile camps • Interpersonal problems within group • Significant misunderstanding exists	• Individual makes statement such as "For the past 20 minutes no one has allowed another person to finish a statement." Leader checks whether others observed same and suggests group discuss problem. • Ask speakers whether they have finished and whether they feel they have been heard.
Disagreement and Polarization • Endless arguing over plans or procedures • Strong disagreement over picayune points	• Conflict in group • Hesitation to deal with agenda item • Distrust of meeting procedures • Fear of "power play" • Belief that any decision is irrelevant because "higher up" will nullify	• Have each member paraphrase what the previous speaker said. • Take time to ensure members understand issue in same way. • Briefly discuss procedures to approach problem and reach consensus. • Take time for group to examine and understand key assumptions held by various members

Keep in mind that the participants bear part of the responsibility for the outcome of the meeting. However, as a meeting leader, you can help participants stay focused and increase the chances of attaining your objectives in the time allotted.

Evaluating the Meeting and Following Up

Meeting evaluation was discussed as Step 6 in the six-step process for meeting planning. Evaluating the meeting is an important step that should not be overlooked. You can review meeting objectives and discuss meeting outcomes with participants or distribute an informal questionnaire and ask participants to write their reactions to the meeting.

Providing follow-up is as important to effective meetings as any of the other functions of the meeting leader. It will be up to you to "keep the ball rolling" after a meeting. You will need to stay in contact with meeting participants to ensure that they are working on any tasks that were assigned during the meeting or to determine whether they require any assistance. Additionally, if you promise to send participants any information, do so immediately.

Facilitating Focus Groups

Focus group interviews are used by researchers in a number of fields to gain feedback and gather information from many people. Following are possible applications of focus groups:

- **To market the work and learning program.** Focus groups are good starting points, especially if you are assisting an SDA other than your own with organizational change. Focus groups will help you get a sense of the community's resources, the attitudes and capacities of the various community partners, and their ideas for academic enrichment.

- **To develop curriculum.** Focus groups help worksite supervisors and teachers think out loud about the key elements of a contextual learning curriculum or plan. The groups facilitate placing diverging perspectives on the table so that the learning process is better integrated with worksite realities.

- **To troubleshoot problems.** Focus groups are excellent for gathering information on an implementation issues when implementation is shared by several community partners. By having all partners represented, you can usually determine where in the process the problem resides and what can be done to fix it.

The major advantage in using focus groups to gather nontechnical information is found in the old adage "two heads are better than one." In the case of focus groups, we are talking about several heads being better!

In addition, focus groups are good motivators for getting people to contribute and usually generate more ideas than one-on-one interviews. In addition, focus groups are inexpensive!

The size of a focus group is important; it should be small enough to encourage every member to contribute and interact and large enough to encompass different points of view. If you are gathering a group of school personnel to help you develop your marketing approach, the group needs to comprise a good mix of positions. In this case, 8 to 12 participants would be appropriate.

On the other hand, if the group consists of employers who will offer feedback on curricula, a smaller, more homogeneous group would be more productive. Five or six supervisors from the same worksite or industry would make up a good focus group in this instance.

It is always a good idea to have two people run a focus group—one person to facilitate the group and the other to take notes. The facilitator is a neutral party who does not actively participate in the discussion except to ask questions and support the group process—keeping the group on track, encouraging individual participation, ensuring that no one dominates the discussion, and managing conflict.

The record keeper does not play an active role in the group, but records everything that is said. At the conclusion of the focus group, the recorder should write up the comments for review and analysis. The ensuing document is your basis for next step, which might be the establishment of a work group to begin the change process discussed in Chapter 1, refining the implementation strategy, preparing a curriculum or learning plan, or taking stock.

Appendix B

Job Analysis and Examples

JOB ANALYSIS INSTRUCTIONS AND EXAMPLES

ACTIVITIES TO COMPLETE PRIOR TO THE INTERVIEW

1. Get the full names, organizational addresses, and phone numbers of the contact person (the person inside the organization who has set up the interview with the job expert) and the job expert (the person who has the necessary knowledge to be interviewed about the target job) from your teacher. Ask your teacher for any other useful information such as directions to the office.

2. Call the contact person to set up and/or agree to the time and place of the interview. (Refer to the "Guidelines for Setting up Phone Interviews" in Appendix A for instructions about topics to discuss with them and the kinds of persons desired for interviews.)

3. You should have the following materials for the interview:

* These instructions
* Criticality Scale
* Two copies each of Skill Definitions (Competencies and Foundations Skills and Personal Qualities)
* Two Job Analysis Forms
* Folder to hold all Interview Forms and Other Materials
* Blank Paper for Miscellaneous Note-taking
* Extra pens/pencils

The Interview Process

These instructions are keyed to the interview form. Study the matching section(s) of the form together with the comments about each section.

Roles of Interview Participants

Team members will pair up to conduct interviews. One member will be called the "Interviewer" and the other will be referred to as the "Notetaker". (These terms will be used in the rest of this form and the job analysis form). Both roles are very important to a successful interview.

The interviewer talks with the job holder during the interview. He/she asks the questions and obtains the job-related information needed on the Job Analysis Form. This person should write the interviewee's answers to questions on his/her copy of the Job Analysis Form in case he/she needs to go back to information during the interview. Both the interviewer and notetaker can later also compare their notes. It is sometimes difficult to fully understand what the interviewee has said while deciding what follow-up questions to ask. This is the reason why the role of the notetaker is so important.

The notetaker has the job of correctly and legibly writing ALL of the answers given by the interviewee onto the Job Analysis Form. The notetaker's finished form will be used for all post- interview activities. The notetaker should also create a list of skills which will be used in the listing of Illustrative Tasks which will be explained later. The process for creating this list is found in the section of this form entitled "VI. Collection of Illustrative Tasks".

Both the interviewer and the notetaker should study the Job Analysis Manual and understand the interview process and goals. The notetaker has the job of making sure that he/she understands the information being discussed during the interview and may ask questions during the interview to better understand, if necessary. Neither the interviewer no the notetaker should be afraid to ask questions. Most people you will interview want to be sure you understand their jobs. They will not know you don't understand unless you ask questions.

I. Introduction

Introduce yourself, and your partner, and give your reasons for the interview. *Hello. I am Kerry Lane and this is Ron Smith. We are students at (local high school) and Laura Peters, your Director of Personnel, set up this interview between us. We are working on a project called*

Explain the program and other background information related to the interview including SCANS.

Explain to the interviewee that you are there to interview them in order to find out about the importance of a set of skills for doing their jobs successfully. Let them know that you will be asking questions and your partner will be writing their answers (although you may also be taking notes). Emphasize that:

- their job has been selected as part of a larger set of jobs

- they are not being judged, instead you are gathering information about the skills needed to perform various jobs

- the interview will take between one and one and two hours

This introduction should take no more than five minutes, however, it is very important to set the proper tone or mood for the interview. At the end of the introduction, the interviewee should understand that they are playing an important role in a project that has important meaning for students and future workers, such as yourselves, and we hope, therefore, they be willing to set aside work duties and concentrate fully on the interview.

It is best that the interview take place at or near the interviewee's normal work place for their convenience. However, this advantage must be played off against the possibilities of interruption, noise, or other disturbances that may happen in the normal work place. If it is obvious that the work place is unsuitable (e.g., the cab of a delivery truck with no place for the interviewer to sit), then the interviewer must quickly suggest a better place. The best time to take care of this is ahead of time. Ask the contact person if there is a suitable, private place for the interview that is near the "tool's that the employee uses.

II. Background Information on Interviewee

Enter interviewers' names and name of target job (that is, the job which is being analyzed in the interview) on the form.

Ask the interviewee for the information there (Name, Organization name and address, Job Title, Phone Number, Position relative to the target job, experience needed for the target job). Also, at this time explain to the interviewee that you and your partner will be taking many notes on a special form during the interview so as to record all the necessary information. Briefly show the interviewee the form and its parts, if they want to see it. If the interviewee does not want to have his/her name on the sheet, then do not record it.

Question 1 relates to getting information about whether and for how long the interviewer has worked at or supervised the target job. Question 2 looks at the types of related experience they have doing or otherwise understanding the job being studied. Question 3 requires you to decide if they have enough experienced to give useful information. In general, they should be able to give useful information if they:

- are presently working on the job and/or supervising this job and have done so for at least six months, unless it is an extremely complex job, in which case a longer period of time should be required.

- Have gotten enough knowledge of the job through prior, on-the-job experience or through study of the job in order to give support to someone who is holding this job. For example, they might be a training specialist who completed a thorough job analysis of the target job in order to provide a training program.

If, when completing Question 3, you do not think the interviewee has the right experience, do not continue the interview. Politely explain to the interviewee why he/she cannot be interviewed, e. g. *It appears there has been a mixup, I was supposed to interview a Bank Teller, or someone very familiar with the Bank Teller job, and you have worked in the bank's computer department for 15 years, but have never been a Bank Teller or supervised Bank Tellers. Let's go find Laura Peters and see what we can do to*

straighten this out. If at all possible, schedule an interview immediately with an appropriate person. If that is not possible, reschedule an interview for another time.

III. General Job Description

In this part of the interview we want to do two things: (1) get a reasonably thorough, general description of the target job and (2) get the interviewee to focus on the target job, to be thinking about the job in a somewhat more analytic manner than they might normally think about the job. Some questions you might ask would be: Why does your job exist? Think carefully about what your work tasks are

Turn to the General Job Description part of the interview form, ask the questions listed in this section of the interview, and write the interviewee's answers. Shown below are some comments and examples of answers to the questions.

A. Main purpose of job--here we want to get the job expert to give the "big picture" for their job. The tendency will usually be to explain that they cannot think of one sentence that summarizes the complexity of their job. Ask them to do it in two or three sentences, if they cannot do it in one. Then you try to combine the sentences and read the single statement back to them for their approval. If all else fails, read them one or more of the following as an example purpose statement.

"The purpose is to enforce laws concerning preservation of wildlife--State Conservation Officer"

"The purpose is to set up and administer programs and systems to provide for the selection and training of company employees--Senior Personnel Officer at mid- sized company"

"The purpose is to sell and deliver snack products to retail outlets within the assigned territory, using a truck provided by the company--route salesperson for snack products company"

B. Three to ten primary duties--here we want to get the job expert to summarize all the duties of the target job in three to ten major duties or groups of duties. It is best to get these duties in verb-object-modifier form, if at all possible, e. g. "Patrol assigned area in squad car in order to detect and suppress criminal activity--Metropolitan police officer". Avoid phrases or single nouns, e.g. "Patrol area", "Communications", etc. It is permissible to list example tasks that fall under the primary duty if that clarifies the duty.

As an example. here are the primary duties of a state correctional officer:

a. Keep proper records appropriate to the type of assignment, e. g. log visitors in visiting area. fill out cell inspection slips for cell shakedowns, complete "use of force" reports when force was required for subduing an inmate.

b. Communicate with other officers and shift supervisors at scheduled intervals and to report events requiring action, e. g. plumbing in need of repair; suspicious activities outside the building.

c. Supervise inmates in their living areas and during work/recreation activities.

d. Supervise inmates during their movements from place to place.

e. Supervise movements of persons who are not inmates and all vehicles while moving into the institution, moving around in the institution, and while moving out of the institution.

IV. & V. Complete Skills Rating

Tell the interviewee that you are now changing your study from a general description of the target job to the gathering of information about the job in terms of the set of skills that is the focus of this project. The goals of this part of the interview are to:

- familiarize the interviewee with the total set of skills
- ask them to rate the criticality or importance of the skills for the successful performance of the target job

General procedure:

Give them the Skills Definition handout (Competencies and/or Foundation Skills and Personal Qualities). Explain that the foundation skills and personal qualities are looked at as

skills/qualities that are more basic, are very important for almost all jobs, and are the building blocks for the functional competencies. The functional competencies are looked at as skills that explain what people in a wide range of jobs actually do at work, but are more general than skills typically required for a particular occupation. Together, the functional competencies and foundation skills and personal qualities are intended to make up a total set of skills such that almost any job could be from start to finish done by a person who has all these skills, if they were given good job-specific training (e.g., statistics courses for a statistician, cosmetology courses for a cosmetologist, etc.).

Explain that they will be asked to rate how critical they feel each skill is to the performance of their job. Ask them to quickly scan the packet to get a feel for the range of skills, but tell them that they will be reading it in detail a bit later in the interview.

Point out to the interviewee that the Competencies definitions include a second paragraph that explains that competence. This paragraph is intended to give additional information on the skill, if needed.

*Hand Criticality Scale to interviewee and give them time to read it.

Your goal, as the interviewer, is to:

*explain the scale to the interviewee, including pointing out that criticality depends upon how often the skill is used as well as the importance of the task which uses the given skill.

For instance, you may say, *Please look at this scale when you read the descriptions of each skill described in your packet. I will ask you to rate how critical you feel the given skill is to the performance of THE TARGET JOB. REMEMBER that critical includes both how often the skill is required for the job as well as the importance of the tasks for which the skill is required. So, for example, you would rate a skill as number 4 or "highly critical" if it is either required very often or it is necessary for highly important tasks or duties.*

For example, a computer programmer who must constantly read manuals and information found on computer screens will likely find these tasks to be critical to performance on the job. For this reason,

the programmer may rate "reading skills" as either "4" (highly critical) or "5" (extremely critical).

You may now ask the interviewee to begin reading the skill definitions, one at a time, and ask for ratings of criticality after each skill.

Ask them to read carefully the descriptions of each skill and then decide how critical each is to the performance of their job. Record their responses in the appropriate spot on the job analysis form

Ignore the Illustrative Task column on the Job Analysis Form at this point. It will described in the next section of the manual.

VI. Collection of Illustrative Tasks

Use the "Illustrative Task Description" pages of the Job Analysis Form to write the descriptions of the tasks for each skill you have found for this part of the interview. Note that each illustrative task is recorded on a separate page.

Your goals, as the interviewer, are to:

describe to the interviewee what Illustrative Tasks are
and
explain how and why we collect these tasks

The procedure for collecting Illustrative Tasks is as follows:

Notetaker:

As the two sets of skills are being rated, the notetaker should choose one skill which has been given the highest rating from EACH OF THE FOLLOWING SKILL GROUPS:

Foundation Skills and Personal Qualities:
- one from Basic Skills
- one from Thinking Skills
- one from Personal Qualities

Competencies:
- one from C1-C8
- one from C9-C14
- one from C15-C20

This should a list of six skills. To do this, he/she should look over their copy of the criticality ratings and choose a skill in each of these groups which was rated "5". If there are no skills rated "5" then the notetaker begins choosing skills rated as "4", and so on until six skills are identified for the next part of the interview. The notetaker should give this list to the interviewer. The notetaker should mark "Y" in the column of the Job Analysis Form entitled "Illustrative Task?" for the chosen skills (after the tasks are given).

Note: Try to get a variety of illustrative tasks over all of the interviews you attend. To do this, choose a skill which was not targeted in a previous interview if several skills in a group are rated highly. This need not be done scientifically and is important only to give you a rich sample of illustrative task descriptions.

Interviewer:

Explain to the interviewee, *I would now like to go back to six of the skills which were the most highly rated. I'll ask you to describe one job task in which you use the skill I mention. This can be any task that involves the use of the skill, but we would prefer the more important or frequently performed tasks that require the skill. After you have thought about it for a bit, I'd like you to give me a one sentence description of the task. Next, I'll ask you to give me a step by step description of the task, with any tools/artifacts you use in each step.*

* Be sure to mark a "y" under the "illustrative task" part of the job analysis form to show that an illustrative task was written for the skill. The tasks should be written on the pages labelled "Illustrative task".

* You may now give the interviewee the name of the first skill, ask for a one sentence description, and then ask for the specific steps and tools needed when performing the task.

Two types of descriptions of the task are called for on the form.

1) The first is a one-sentence description of the verb-object-modifier form, e. g. "Select statistic appropriate for the data analysis problem", rather than "Do statistical work"; or "Plan route for making deliveries to customers", rather than "Make plans".

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2) The second description is a detailed step-by-step break out of the task with an identification of each artifact or tool (e.g., written instructions in manuals, forms, computer manuals, computers, calculators) used in each step. Space is provided for up to ten steps. This should be more than enough unless the original task is very broad. Again, use the verb-object-modifier form if at all possible.

* Get enough information to describe the basic tasks of each tool. Note also that the level of detail is not at the finest nor most exact level (e. g. "Walk to break room", "Obtain supervisor's signature on the bottom block of the company route form."), but all steps are subsumed under the one- sentence description of the task.

An example: "Plan route for making deliveries to customers."

Step 1: Obtain list of customer addresses from supervisor and a map of delivery territory.

Tools: 1.List of customer addresses (example attached) 2. City map (Greater Chicago Metropolitan area, circa 1985) posted in employee break room with markable plastic cover

Step 2: Mark positions of customers on map

Tools: Magic Marker

Step 3: Compare customer positions relative to major roads

Step 4: Decide which customer to visit first, which second, etc. based on their relative positions and the positions of major roads and following the "principles of route planning"

Tools: 1. Company route form, basically a sequential listing of customers to be visited, with addresses, example attached
2. "Principles of Route Planning", a company pamphlet, copy attached

Step 5: Compute the total miles of the route by adding up the miles from company site to the customers as listed and back to the site and record on the company route form.

Tools: Simple Calculator (Casio Model E-10), uses only addition function

Step 6: Show route form to supervisor for his review and approval, do it again, if necessary, incorporating suggested improvements .

VII. Wrap-up

When you have completed the collection of the Illustrative Tasks, you have finished the most important parts of the interview. Now is the time to thank the interviewee for their cooperation and time and to ask for any general comments that they might have about the project or the skills.

Before you leave, be sure that you have with you:

- the completed job analysis forms
- miscellaneous notes and materials

Finally, as you leave, thank the interviewee one more time and ask for permission to call them if you have follow-up questions when you go over the information.

Activities to Complete After the Interview

1. Review the completed forms and prepare any materials requested by your teacher. A sample summary might include:

   - list of the job name, interviewers' names, and date of interview
   - summary of the general job description and duties
   - list of names of the six skills for which the illustrative tasks were collected and the one sentence description of the tasks. For example, Manages Time, Plans route for making deliveries to customers
   - any comments on the actual interview process that should be known by others in order to properly interpret the package of information

   Attach this summary in front of the job analysis form.

2. During the review, try to make sure of the legibility and understandability of all the information on the form and the summary. Especially look for comments which are so short that you

may understand them now, but may not be able to understand them one month from now when you go beck to your report.

3. Write a thank you letter to both the contact and the interviewees.

4. Code each interview based upon a predetermined method and record the code on the Job Analysis Form and the summary. Codes are unique to an interviewee and are used for identification in the data base. Generally, numeric codes are used (for example, 001, 002, 003...).

APPENDIX A

GUIDELINES FOR SETTING UP JOB INTERVIEWS

I. Once you have the name of the contact person and the job(s) for which you are responsible, you should call the contact person to set up your interviews and job shadowing. The key points of your conversation with the contact person should include the following:

a. An introduction of who you are, who provided you with the person's name, and what is about.

b. A description of who you want to interview, the target job; yourdesire is to interview people who:

1. have experience on the job, and
2. have a thorough knowledge of the job

c. The fact that you may need up to one to two hours to interview each person (explain that you understand this is a large amount of time to ask a company to free up its workers, but that we want to be sure we have a good understanding of what job skills these workers should have for an entry position).

d. Our need for a place for the interview that will be reasonably comfortable and have enough space and privacy for the interviewee, the interviewer and the notetaker (more room if you are going to tape this interview).

e. Make sure, in advance, how you will get to the interview location and ask for directions. Get some idea of how long it will take to get there from where you will be. Make sure you can be there on time. In fact, you should be at the interview site at least ten minutes early so that the interviewee does not have to wait for you.

II. When you receive the names of the interviewees, ask the contact person for permission to call the interviewee immediately so you canintroduce yourself to them and make sure the place and time works into their schedule. Call that person immediately. After checking on the telephone, get an address and verify once again with a letter.

III. When your interviews are finished, write a thank you letter to both the contact person and the interviewees.

JOB ANALYSIS FORM

You have read the accompanying Job Analysis Instructions and Examples in preparation for this interview. This Job Analysis Form is intended as a document in which to write the information gotten during job analysis interviews. However, to make the interview process run more smoothly, we have put into the forms a number of cues from the job analysis instructions in this document to remind you of what to do and what type of information to gather.

We have also given a number of "verbatim" quotes which you may use during the interview to get information. These have been ITALICIZED to set them apart from general guidelines. Remember, you do not have to read the italicized words during the interview. It is always better to ask questions and explain information in your own words. However, if you run into problems, these quotes are there for your convenience.

THIS FORM DOES NOT REPLACE THE JOB ANALYSIS INSTRUCTIONS AND EXAMPLES DOCUMENT. YOU MUST FAMILIARIZE YOURSELF WITH THE CONTENTS OF BOTH DOCUMENTS.

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Code#_____

SCANS/ Job Analysis Form

I. Introduction (In this section, you will introduce yourselves and supply background information on as well as the interview purpose).

* Introduce self

* Explain the program and other background information, including SCANS

Explain the purpose of the interview

II. Background Information (In this section, you will gather and record relevant background information).

Name of Interviewer_____

Name of Notetaker_____

Target Job Title_____

Date of Interview _____Mo _____Day_____Year

Name of Job Expert_____

Organization:

Name_____

Address_____

_____

Phone Number_____

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Ask the interviewee the following questions about his position and experience relative to the present job:

1. *Have you ever worked at or supervised individual(s) in (target job)?* Place an X next to the correct response.

_____ worked in the job
_____ supervised the job
_____ both worked in and supervised the job
_____ neither worked in nor supervised the job

If the interviewee has worked in and/or supervised the job, ask them how long they have done so.

Worked at the job: _____years _____months

Supervised the job: _____years _____months

2. If interviewee has never worked in or supervised the target job, then ask:

How did you get your knowledge of (target job)?

_____

_____

_____

_____

3. After asking the above questions, mark the option below that best describes this persons experience relative to the target job:

_____ Has worked in or supervised the target job for six months or more within the recent past

_____ Has gotten enough knowledge of the job to be interviewed, but not by working at or supervising the job (specify means)

_____ Does not have enough knowledge of the job to give useful information

(If you mark this option, politely end the interview and check with the organizational contact about the possibilities of setting up a new interview at this time or some time in the future).

For example, you might say,

It appears there has been a mixup. I was supposed to interview a Bank Teller, or someone very familiar with the Bank Teller job. You have worked in the bank's computer department for 15 years, but have never been a Bank Teller or supervised Bank Tellers. Let's go find Laura Peters and see what we can do to straighten this out.

III. General Job Description (In this section, you will gather general information about the purpose of the job and the major duties performed.)

A. *Please tell me, in one sentence, what the main purpose of the (target job) is? In other words, why does the job exist?*

B. *What are the primary or major job duties for (target job)?* There should be about three to ten of these major duties.

Duty 1.

Duty 2.

Duty 3.

Duty 4.

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Duty 5.

Duty 6.

Duty 7.

Duty 8.

Duty 9.

Duty 10.

Continue with:

I am now changing my study from a general description of the target job to gathering of information about the job in terms of the set of skills in which we are interested.

Steps in the process:

* Hand the interviewee one copy of each of the following packet(s) of skills: a) Foundation Skills and Personal Qualities Definitions and/or b) Competencies Definitions.

* Explain that they will be asked to rate how critical they feel each skill is to the performance of their job. Ask them to quickly look at the packet to get a feel for the range of skills, but tell them that they will be reading it in detail a bit later in the interview.

* Hand Criticality Scale to interviewee and give them time to read it.

Your goal, as the interviewer, is to explain the scale to the interviewee, including pointing out that criticality depends upon the number of times the skill is used as well as the importance of the task which uses that skill

For instance, you may say:

Please look at this scale when you read the descriptions of each skill defined in your packet. I will ask you to rate how critical you think the given skill is to the performance of THE TARGET JOB. REMEMBER that critical includes both how often the skill is required for the job as well as the importance of the tasks for which the skill is required. So, for example, you would rate a skill as number 4 or "highly critical" if it is either required very often or it is necessary for highly important tasks or duties.

You may now ask the interviewee to begin reading the skill definitions, one at a time, and ask for ratings of criticality after each skill.

IV. Ratings of Foundation Skills and Personal Qualities

(In this section, you will record the criticality ratings for each skill and whether or not an illustrative task was described.)

Criticality Rating (1-5)	Illustrative Task (Y or N)	Skill
		Foundation Domain 1 - Basic Skills
_____	_____	F1. Reading
_____	_____	F2. Writing
_____	_____	F3. Arithmetic
_____	_____	F4. Mathematics
_____	_____	F5. Listening
_____	_____	F6. Speaking
		Foundation Domain 2 - Thinking Skills
_____	_____	F7. Creative Thinking
_____	_____	F8. Decision-Making
_____	_____	F9. Problem-Solving
_____	_____	F10. Seeing Things in the Mind's Eye
_____	_____	F11. Knowing How to Learn
_____	_____	F12. Reasoning

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Foundation Domain 3 - Personal Qualities

_____	_____	F13. Responsibility
_____	_____	F14. Self-Esteem
_____	_____	F15. Social
_____	_____	F16. Self-Management
_____	_____	F17. Integrity/Honesty

V. Ratings of Competencies

(In this section, you will record the criticality ratings and whether or not an illustrative task was described).

Criticality Rating (1-5)	Illustrative Task (Y or N)	Skill
		Domain 1 - Resources
_____	_____	C1. Manages Time
_____	_____	C2. Manages Money
_____	_____	C3. Manages Material and Facility Resources
_____	_____	C4. Manages Human Resources
		Domain 2 - Information
_____	_____	C5. Acquires and Evaluates Information
_____	_____	C6. Organizes and Maintains Information
_____	_____	C7. Interprets and Communicates Information
_____	_____	C8. Uses Computers to Process Information

Criticality Rating (1-5)	Illustrative Task (Y or N)	Skill
		Domain 3 - Interpersonal
_____	_____	C9. Participates as a Member of a Team
_____	_____	C10. Teaches Others
_____	_____	C11. Serves Clients/Customers
_____	_____	C12. Exercises Leadership
_____	_____	C13. Negotiates to Arrive at a Decision
_____	_____	C14. Works with Cultural Diversity
		Domain 4 - Systems
_____	_____	C15. Understands Systems
_____	_____	C16. Monitors and Corrects Performance
_____	_____	C17. Improves and Designs Systems
		Domain 5 - Technology
_____	_____	C18. Selects Technology
_____	_____	C19. Applies Technology to Task
_____	_____	C20. Maintains and Troubleshoots Technology

VI. Collection of Illustrative Tasks (In this section, you will collect task descriptions.)

The next step in the interview process is the collection of "Illustrative Tasks". Your goals, as the interviewer, are to:

- describe to the interviewee what Illustrative tasks are, and
- explain how and why we collect these tasks

Explain to the interviewee:

I would now like to go back to six of the skills which were the most highly rated. I'll ask you to describe one job task in which you use the skill I mention. This can be any task that involves the use of the skill, but we would prefer the more important or frequently performed tasks that require the skill. After you have thought about it for a bit, I'd like you to give me a one sentence description of the task. Next, I'll ask you to give me a step by step description of the task, with any tools/artifacts you use in each step.

Be sure to mark a "y" under the "illustrative task" part of the job analysis form to indicate that an illustrative task was recorded for the skill. The tasks should be recorded on the pages labelled "Illustrative task".

You may now give the interviewee the name of the first skill, ask for a one sentence description, and then ask for the specific steps and tools needed when performing the task.

1. Skill Illustrated

A. One Sentence Description of the task (Verb-Noun-Modifier form)

B. Step by step description of task, with tools/artifacts employed:

Step	Description

1._____

Tools:

2._____

Tools:

3._____

Tools:

4._____

Tools:

5._____

Tools:

6._____

Tools:

7._____

Tools:

8._____

Tools:

9._____

Tools:

10._____

Tools:

2. Skill Illustrated

A. One Sentence Description of the task (Verb-Noun-Modifier form)

B. Step by step description of task, with tools/artifacts employed:

Step Description

1._____

Tools:

2._____

Tools:

3._____

Tools:

4._____

Tools:

5. _____

Tools:

6. _____

Tools:

7. _____

Tools:

8. _____

Tools:

9. _____

Tools:

10. _____

Tools:

3. Skill Illustrated

A. One Sentence Description of the task (Verb-Noun-Modifier form)

B. Step by step description of task, with tools/artifacts employed:

Step	Description

1. _____

Tools:

2. _____

Tools:

3. _____

Tools:

4. _____

Tools:

5._____

Tools:

6._____

Tools:

7._____

Tools:

8._____

Tools:

9._____

Tools:

10._____

Tools:

4. Skill Illustrated

A. One Sentence Description of the task (Verb-Noun-Modifier form)

B. Step by step description of task, with tools/artifacts employed:

Step	Description

1._____

Tools:

2._____

Tools:

3._____

Tools:

4._____

Tools:

5._____

Tools:

6._____

Tools:

7._____

Tools:

8._____

Tools:

9._____

Tools:

10._____

Tools:

5. Skill Illustrated

A. One Sentence Description of the task (Verb-Noun-Modifier form)

B. Step by step description of task, with tools/artifacts employed:

Step Description

1._____

Tools:

2._____

Tools:

3._____

Tools:

4._____

Tools:

5._____

Tools:

6._____

Tools:

7._____

Tools:

8._____

Tools:

9._____

Tools:

10._____

Tools:

6. Skill Illustrated

A. One Sentence Description of the task (Verb-Noun-Modifier form)

B. Step by step description of task, with tools/artifacts employed:

Step	Description

1. _____

Tools:

2. _____

Tools:

3. _____

Tools:

4. _____

Tools:

5._____

Tools:

6._____

Tools:

7._____

Tools:

8._____

Tools:

9._____

Tools:

10._____

Tools:

VII. Wrap-up (In this section, you will end the interview.)

When you have completed gathering the Illustrative Tasks, you have finished the most important parts of the interview. Now is the time to thank the interviewee for their cooperation and time and to ask for any general comments that they might have about the project or the skills.

Before you leave, be sure that you have with you:

- the completed job analysis forms
- miscellaneous notes and materials

Finally, as you leave, thank the interviewee one more time and ask for permission to call them if you have follow-up questions when you go over the information.

CRITICALITY SCALE

1	Not Critical	This skill is not required for this job.
2	Somewhat Critical	This skill is occasionally required or is needed for minor duties or tasks.
3	Moderately Critical	This skill is often required or is necessary for somewhat important duties.
4	Highly Critical	This skill is very often required or is necessary for highly important tasks or duties.
5	Extremely Critical	This job could not be done at all without frequent, competent use of the skill.

tasks or

FOUNDATION SKILLS AND PERSONAL QUALITIES DEFINITIONS

Basic Skills

Basic skills such as reading, writing, arithmetic, mathematics, listening, and speaking.

F1 Reading - Locates, understands, and interprets written information in prose and documents -- including manuals, graphs, and schedules -- to perform tasks; learns from text by determining the main idea or essential message; identifies relevant details, facts, and specifications; infers or locates the meaning of unknown or technical vocabulary; judges the accuracy, appropriateness, style, and plausibility of reports, proposals, or theories of other writers.

F2 Writing - Communicates thoughts, ideas, information, and messages in writing; records information completely and accurately; composes and creates documents such as letters, directions, manuals, reports, proposals, graphs, flow charts; uses language, style, organization, and format appropriate to the subject matter, purpose, and audience. Includes supporting documentation and attends to level of detail; checks, edits, and revises for correct information, appropriate emphasis, form, grammar, spelling, and punctuation.

F3 Arithmetic - Performs basic computations; uses basic numerical concepts such as whole numbers and percentages in practical situations; makes reasonable estimates of arithmetic results without a calculator; and uses tables, graphs, diagrams, and charts to obtain or convey quantitative information.

F4 Mathematics - Approaches practical problems by choosing appropriately from a variety of mathematical techniques; uses quantitative data to construct logical explanations for real world situations; expresses mathematical ideas and concepts orally and in writing; understands the role of chance in the occurrence and prediction of events.

F5 Listening - Receives, attends to, interprets, and response to verbal messages and other cues such as body language in ways that are appropriate to the purpose; for example, to comprehend; to learn; to critically evaluate; to appreciate; or to support the speaker.

F6 Speaking - Organizes ideas and communicates oral messages appropriate to listeners and situations; participates in conversation, discussion, and group presentations; selects an appropriate medium for conveying a message; uses verbal language and other cues such as body language appropriate in style, tone, and level of complexity to the audience and the occasion; speaks clearly and communicates a message; understands and response to listener feedback; and asks questions when needed.

Thinking Skills

Basic cognitive skills such as creative thinking, decision- making, problem-solving, mental visualization, knowing how to learn, and reasoning.

F7 Creative Thinking - Uses imagination freely, combines ideas or information in new ways, makes connections between seemingly unrelated ideas, and reshapes goals in ways that reveal new possibilities.

F8 Decision-Making - Specifies goals and constraints, generates alternatives, considers risks, and evaluates and chooses best alternative.

F9 Problem-Solving - Recognizes that a problem exists (i.e., there is a discrepancy between what is and what should or could be); identifies possible reasons for the discrepancy, and devises and implements a plan of action to resolve it. Evaluates and monitors progress and revises plan as indicated by findings.

F10 Seeing Things in the Mind's Eye - Organizes and processes symbols, pictures, graphs, objects or other information; for example, sees a building from a blueprint; a system's operation from schematics; the flow of work activities from narrative descriptions; or the taste of food from reading a recipe.

F11 Knowing How to Learn - Recognizes and can use learning techniques to apply and adapt new knowledge and skills in both familiar and changing situations. Involves being aware of learning tools such as personal learning styles (visual, aural, etc.), formal learning strategies (note taking or clustering items that share some characteristics), and informal learning strategies (awareness of unidentified false assumptions that may lead to faulty conclusions).

F12 Reasoning - Discovers a rule or principle underlying the relationship between two or more objects and applies it in solving a problem. For example, uses logic to draw conclusions from available information; extracts rules or principles from a set of objects or written text; applies rules and principles to a new situation or determines which conclusions are correct when given a set of facts and a set of conclusions.

Personal Qualities

Personal qualities such as a sense of responsibility, self- esteem, social competence, self-management, and integrity/honesty.

F13 Responsibility - Exerts a high level of effort and perseverance towards goal attainment. Works hard to become excellent at doing tasks by setting high standards, paying attention to details, working well and displaying a high level of concentration even when assigned an unpleasant task. Displays high standards of attendance, punctuality, enthusiasm, vitality, and optimism in approaching and completing tasks.

F14 Self-Esteem - Believes in own self-worth and maintains a positive view of self; demonstrates knowledge of own skills and abilities; is aware of impact on others; knows own emotional capacity and needs and how to address them.

F15 Social - Demonstrates understanding, friendliness, adaptability, empathy and politeness in new and on-going group settings. Asserts self in familiar and unfamiliar social situations; relates well to others; responds appropriately as the situation requires; takes an interest in what others say and do.

F16 Self-Management - Assesses own knowledge, skills, and abilities accurately; sets well-defined and realistic personal goals; monitors progress toward goal attainment and motivates self through goal achievement; exhibits self- control and responds to feedback unemotionally and non- defensively; is a "self-starter".

F17 Integrity/Honesty - Can be trusted; recognizes when faced with making a decision or exhibiting behavior that may break with commonly-held personal or societal values; understands the impact of violating these beliefs and codes on an organization, self, and others; chooses an ethical course of action.

COMPETENCIES DEFINITIONS

Identifies, organizes, plans, and allocates resources. This includes understanding, preparing, and following a schedule; preparing and following a budget; and allocating material, facility, and human resources.

C1 Allocates Time - Selects relevant, goal-related activities, ranks them in order of importance, allocates time to activities, and understands, prepares, and follows schedules.

Competent performance in managing time includes properly identifying tasks to be completed; ranking tasks in order of importance; developing and following an effective, workable schedule based on accurate estimates of such things as importance of tasks, time to complete tasks, time available for completion, and task deadlines; avoiding wasting time; and accurately evaluating and adjusting a schedule.

C2 Allocates Money - Uses or prepares budgets, including making cost and revenue forecasts, keeps detailed records to track budget performance, and makes appropriate adjustments.

Competent performance in managing money includes accurately preparing and using a budget according to a consistent and orderly accounting method; accurately calculating future budgetary needs based on projected costs and revenues; accurately tracking the extent to which actual costs and revenues differ from the estimated budget, and taking appropriate and effective actions.

C3 Allocates Material and Facility Resources - Acquires, stores, and distributes materials, supplies, parts, equipment, space, or final products in order to make the best use of them.

Competent performance in managing material and facility resources includes carefully planning the steps involved in the acquisition, storage, and distribution of resources; safely and efficiently acquiring, transporting or storing them; maintaining them in good condition; and distributing them to the end user.

C4 Allocates Human Resources - Assesses knowledge and skills and distributes work accordingly, evaluates performance and provides feedback.

Competent performance in managing human resources includes accurately assessing peoples' knowledge, skills, abilities, and potential; identifying present and future workload; making effective matches between individual talents and workload; and actively monitoring performance and providing feedback.

INFORMATION

Acquires and applies necessary information routinely in job performance. This includes acquiring, evaluating, organizing, maintaining, interpreting, and communicating information, and using computers to process such information.

C5 Acquires and Evaluates Information - Identifies need for data, obtains it from existing sources or creates it, and evaluates its relevance and accuracy.

Competently performing the tasks of acquiring data and evaluating information includes analytic questions to determine specific information needs; selecting possible information and evaluating its appropriateness; and determining when new information must be created.

C6 Organizes and Maintains Information - Organizes, processes, and maintains written or computerized records and other forms of information in a systematic fashion.

Competently performing the tasks of organizing and maintaining information includes understanding and organizing information from computer, visual, oral and physical sources in readily accessible formats, such as computerized data bases, spreadsheets, microfiche, video disks, paper files, etc.; when necessary, transforming data into different formats in order to organize it by the application of various methods such as sorting, classifying, or more formal methods.

C7 Interprets and Communicates Information - Selects and analyzes information and communicates the results to others using oral, written, graphic, pictorial, or multi-media methods.

Competently performing the tasks of communicating and interpreting information to others includes determining information to be communicated; identifying the best methods to present information (e.g., overheads, handouts); if necessary, converting to desired format and conveying information to others through a variety of means including oral presentation, written communication, etc.

C8 Uses Computers to Process Information - Employs computers to acquire, organize, analyze, and communicate information.

Competently using computers to process information includes entering, modifying, retrieving, storing, and verifying data and other information; choosing format for display (e.g., line graphs, bar graphs, tables, pie charts, narrative); and ensuring the accurate conversion of information into the chosen format.

INTERPERSONAL

Associates with others in order to achieve a common goal. This includes participating as a member of a team, teaching other, serving clients/customers, exercising leadership, negotiating to arrive at a decision, and working with cultural diversity.

C9 Participates as a Member of a Team - Works cooperatively with others and contributes to group with ideas, suggestions, and effort.

Demonstrating competence in participating as a member of a team includes doing own share of tasks necessary to complete a project; encouraging team members by listening and responding appropriately to their contributions; building on individual team members strengths; resolving differences for the benefit of the team; taking personal responsibility for accomplishing goals; and responsibly challenging existing procedures, policies, or authorities.

C10 Teaches Others - Helps others learn.

Demonstrating competence in teaching others includes helping others to apply related concepts and theories to task through coaching or other means; identifying training needs; conveying job information to allow others to see its applicability and relevance to tasks; and assessing performance and providing constructive feedback/reinforcement.

C11 Serves Clients/Customers - Works and communicates with clients and customers to satisfy their expectations.

Demonstrating competence in serving clients and customers includes actively listening to customers to avoid misunderstandings and identifying needs; communicating in a positive manner especially when handling complaints or conflict; efficiently obtaining additional resources to satisfy client needs.

C12 Exercises Leadership - Communicates thoughts, feelings, and ideas to justify a position, encourages, persuades, convinces, or otherwise motivates an individual or groups, including responsibly challenging existing procedures, policies, or authority.

Demonstrating competence in exercising leadership includes making positive use of the rules/values followed by others; justifying a position logically and appropriately; establishing credibility through competence and integrity; taking minority viewpoints into consideration.

C13 Negotiates to Arrive at a Decision - Works towards an agreement that may involve exchanging specific resources or resolving divergent interests.

Demonstrating competence in negotiating to arrive at a decision involves researching opposition and the history of the conflict; setting realistic and attainable goals; presenting facts and arguments; listening to and reflecting on what has been said; clarifying problems and resolving conflicts; adjusting quickly to new facts/ideas; proposing and examining possible options; and making reasonable compromises.

C14 Works with Cultural Diversity - Works well with men and women and with a variety of ethnic, social, or educational backgrounds.

Demonstrating competence in working with cultural diversity involves understanding one's own culture and those of others and how they differ; respecting the rights of others while helping them make cultural adjustments where necessary; basing impressions on individual performance, not on stereotypes; understanding concerns of members of other ethnic and gender groups.

SYSTEMS

Understands how system components interact to achieve goals. This includes understanding how systems work, monitoring and correcting performance, and improving and designing systems.

C15 Understands Systems - Knows how social, organizational, and technological systems work and operates effectively within them.

Demonstrating competence in understanding systems involves knowing how a system's structures relate to goals; responding to the demands of the system/organization; knowing the right people to ask for information and where to get resources; and functioning within the formal and informal codes of the social/organizational system.

C16 Monitors and Corrects Performance - Distinguishes trends, predicts impact of actions on system operations, diagnoses deviations in the function of a system/organization, and takes necessary action to correct performance.

Demonstrating competence in monitoring and correcting performance includes identifying trends and gathering needed information about how the system is intended to function; detecting deviations from system's intended purpose; troubleshooting the system: making changes to the system to rectify system functioning and to ensure quality of product.

C17 Improves and Designs Systems - Makes suggestions to modify existing systems to improve products or services, and develops new or alternative systems.

Demonstrating competence in improving or designing systems involves making suggestions for improving the functioning of the system/organization; recommending alternative system designs based on relevant feedback; and responsibly challenging the status quo to benefit the larger system.